

UTILITY ALLOWANCES

January 2021

Utility Allowance

The purpose of this training is to provide guidance for calculating a Utility Allowance (UA) under the Department's multifamily programs.

The Department will cite noncompliance and/or not approve a UA if it is not calculated in accordance with the requirements of 10 TAC §10.614, Treasury Regulation 1.42-10 and Chapter 18 of the 8823 Audit Guide.

Owners are required to comply with the provisions of the above section as well as any existing federal or state program guidance.

Frequently asked questions (FAQ) can be found on the Department's website: <https://www.tdhca.state.tx.us/pmcomp/compFaqs.htm>

Utility Allowance

Utility Allowance Information

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>



The Utility Allowance Team

Cara Pollei, cara.pollei@tdhca.state.tx.us

Carolyn Metzger, carolyn.metzger@tdhca.state.tx.us

Nicole Martinez, nicole.martinez@tdhca.state.tx.us

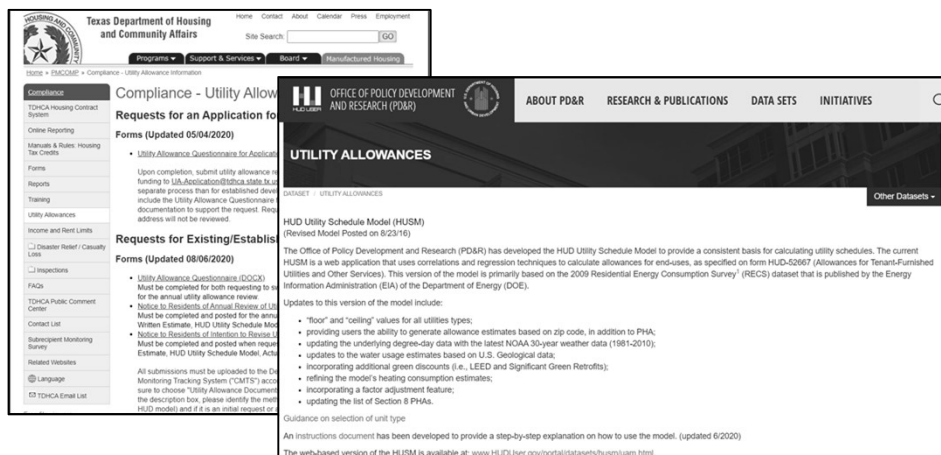
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Utility Allowance

Where to find important documents and information:

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

<https://www.huduser.gov/portal/resources/utillallowance.html>



These forms are updated periodically, please make sure you are checking the websites and using the most current version of the required documents.

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Utility Allowance: Definitions & Terms

- Building Types
 - HUD Document referenced in §10.614(b)(1): https://www.hud.gov/sites/documents/DOC_11608.PDF
 - Additional Resource from HUD: <https://www.huduser.gov/portal/sites/default/files/pdf/HUSM-Instructions.pdf>
- Power to Choose
 - <http://powertochoose.com/>
- Component Charges
 - The actual cost associated with the billing of a residential utility
 - Rates, Fees, Taxes
- Multifamily Direct Loan (MFDL)
 - Funds provided through the HOME Program (HOME), Neighborhood Stabilization Program (NSP), National Housing Trust Fund (NHTF), Repayments from the Tax Credit Assistance Program (TCAP RF), or other program available through the Department, local political subdivision, or administrating agency for multifamily development that require a Utility Allowance

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Utility Allowance: Definitions & Terms

- Renewable Source
 - Energy produced from energy property described in IRC §48 or IRC §45(d)(1) through (4), (6), (9) or (11)
- Submetered Utility
 - A utility purchased from or through a local utility provider by the building owner where the resident is billed directly by the owner of the building or to a 3rd party billing company
 - This must be based on the resident's actual consumption of that utility and not an allocation method or Ratio Utility Billing System (RUBS); and
 - The rate at which the utility is billed does not exceed the rate incurred by the building owner for that utility
- Utility Allowance
 - An estimate of the expected monthly cost of any utility for which a resident is financially responsible (other than phone, cable or internet)
- Utility Provider
 - The company that provides the residential utility service, AKA "Provider"

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Utility Allowance: Required Forms

- Utility Allowance Questionnaire
- Resident Posting (Annual or Change)
- Previous Year's approved UA
- Current Methodology request and all necessary back-up

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

The collage displays four forms related to utility allowance. The top-left form is a 'NOTICE TO RESIDENTS OF ANNUAL REVIEW OF UTILITY ALLOWANCE'. The top-right form is a 'NOTICE TO RESIDENTS OF INTENTION TO CHANGE THE METHODOLOGY USED TO CALCULATE THE UTILITY ALLOWANCE'. The middle form is the 'Utility Allowance Questionnaire', which includes sections for development information, a table for utility allowance methods, and a section for payment information. The bottom form is a 'Resident Posting' form, which includes fields for resident information and a section for utility allowance details.

Utility Allowance: How to Submit

All submissions must be uploaded to the development's Compliance Monitoring Tracking System (CMTS) account. When uploading, please be sure to choose "Utility Allowance Documents" in the "Type" dropdown menu. In the description box, please identify the method (e.g., Written Local Estimate, HUD model, etc.) and if it is an initial request or annual review. In the "TDHCA Contact" dropdown menu, please select "Utility Allowance."

If the submission is not uploaded as outlined above it will not be received by the Utility Allowance Team and the development may be cited with noncompliance.

Utility Allowance: Methodologies

Types of Utility Allowance (UA) Methodologies

- Not Department Issued
 - Rural Housing Services (RHS or RD)
 - HUD-Issued Utility Allowance
- Department Reviewed and/or Issued
 - Public Housing Authority (PHA)
 - Written Local Estimate (WLE)
 - Energy Consumption Model (ECM)
 - Actual Use Method
 - HUD Utility Schedule Model (HUSM)

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Utility Allowance: PHA Method

Public Housing Authority (PHA) Method

- The Utility Allowance established by the applicable PHA for the Housing Choice Voucher Program (HCV Program)
 - If a PHA provides vouchers to your tenants but is not the most applicable PHA you would not be able to use the UA schedule from that PHA
- If the PHA publishes different schedules based on building type, the owner is responsible for implementing the correct schedule based on the development's building type(s)
 - In the event the PHA publishes a UA Schedule specifically for energy efficient units, and the owner desires to use such a schedule, the owner must demonstrate that the building(s) meet the PHA's specifications for energy efficiency once every five years
 - If the PHA Utility Schedule lists flat fees for any utility, those flat fees must be included in the calculation of the Utility Allowance, if the resident is responsible for that utility
- This methodology must be used for the voucher holders from the PHA (unless the buildings has MFDL funds)

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Utility Allowance: PHA Method

Public Housing Authority (PHA) Method continued

- If the development is located in an area that does not have a municipal, county or regional housing authority that publishes a Utility Allowance schedule for the HCV Program, owners must select an alternative methodology, unless the building(s) is(are) located in the published HCV service area of:
 - A Council of Government (COG) created under Texas Local Government Code, Chapter 303, that operates a Housing Choice Voucher Program;
 - The Department's Housing Choice Voucher Program; or
 - Another PHA which publishes a separate utility allowance schedule specific to the development's location
- Annual review by the Department is not required, unless there is a change to the utilities the resident is financially responsible for

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Utility Allowance: PHA Method

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Multi-Family (Elevator)**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas						
b. Bottle Gas/Propane						
c. Electric						
d. Oil / Other						
Cooking						
a. Natural Gas						
b. Bottle Gas/Propane						

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Multi-Family (Apartment)**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas						
b. Bottle Gas/Propane						
c. Electric						
d. Oil / Other						
Cooking						
a. Natural Gas						
b. Bottle Gas/Propane						

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Single-Family (Detached House)**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas						
b. Bottle Gas/Propane						
c. Electric						
d. Oil / Other						
Cooking						
a. Natural Gas						
b. Bottle Gas/Propane						

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Semi-Detached/Duplex**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas						
b. Bottle Gas/Propane						
c. Electric						
d. Oil / Other						
Cooking						
a. Natural Gas						
b. Bottle Gas/Propane						

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Row House/Townhouse**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	\$8.00	\$9.00	\$10.00	\$10.00	\$11.00	\$12.00
b. Bottle Gas/Propane						
c. Electric	\$9.00	\$11.00	\$13.00	\$15.00	\$17.00	\$19.00
d. Oil / Other						
Cooking						
a. Natural Gas	\$1.00	\$1.00	\$2.00	\$3.00	\$4.00	\$4.00
b. Bottle Gas/Propane						

Utility Allowance Schedule
See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 25577-0169 exp. 7/31/2022

Date (mm/dd/yyyy):

Locality: **Housing Authority of the City of Austin, TX**
Unit Type: **Single-Family (Detached House)**

Utility or Service:	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	\$8.00	\$10.00	\$10.00	\$11.00	\$12.00	\$13.00
b. Bottle Gas/Propane						
c. Electric	\$13.00	\$15.00	\$17.00	\$19.00	\$21.00	\$23.00
d. Oil / Other						
Cooking						
a. Natural Gas	\$1.00	\$1.00	\$2.00	\$3.00	\$4.00	\$4.00
b. Bottle Gas/Propane						

<https://www.hacanet.org/wp-content/uploads/2020/03/Utility-allowance-schedules-2020.pdf>

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Utility Allowance: PHA Method

PHA Contact Report by State and City 1 / 93

PHA Contact Information
This listing is ordered by city and based on the information in IMS/PIC system.

PHA Code	Name, Phone, Fax, Email	Physical Address	Type
TX327	Housing Authority of the City of Abilene Phone: (325)676-6385 x6394 Fax: (325)676-6375 Email: Gene.Reed@abilenaha.org	1149 E South 11th Street ABILENE TX , 79602	Combined
TX064	Alamo Housing Authority Phone: (956)787-2352 Fax: (956)781-8886 Email: mveita@alamoha.com	309 N. 9th St. ALAMO TX , 78516	Combined
TX241	Housing Authority of Alba Phone: (903)765-2541 Fax: (903)765-9019 Email: albahousingauthority@gmail.com	145 N. Osborn St ALBA TX , 75410	Low-Rent
TX178	Alice Housing Authority Phone: (361)664-3453 Fax: (361)664-3464 Email: info@alicesha.com	125 Omila Alice TX , 78333	Combined

The Department will utilize this report to determine the applicable PHA for the area; however, the PHA used must participate in the Section 8 Program.

https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf

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Utility Allowance: PHA Method

What if the development is in an area that does not have a PHA, but another PHA serves the area?

In this case, the PHA that serves the area **MUST** issue a Utility Allowance for the specific area in which a development is located in order to use this methodology.

Allowances for Tenant-Furnished Utilities and Other Services			U.S. Department of Housing and Urban Development Office of Public and Indian Housing					
Locality		Age	Unit Type					Date (mm/dd/yyyy)
Arlington Housing Authority		Mixed Age	Multi Family - IRVING					1/1/2018
Utility or Service		Monthly Dollar Allowances						
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
Heating	a. Natural Gas	24	34	43	53	68	77	87
	b. Bottle Gas							
	c. Electric	17	23	30	37	47	54	60
	d. Oil / Coal / Other							
Cooking	a. Natural Gas	7	9	12	15	19	21	24
	b. Bottle Gas							

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Utility Allowance: Written Local Estimate

Written Local Estimate (WLE) Method

- The estimate must...
 - come from the local utility provider
 - be signed by the utility provider representative
 - include all component charges for providing the utility service
 - include all items which contribute to the utility
 - An estimate from the electric provider must include all items which are reflected on the electric bill for the resident. If the estimate does not include the air conditioning, for example, it is not an acceptable estimate and may result in noncompliance during the development's next monitoring review.
- The beginning of the 90-day notification period should be the date of the letter from the utility provider; however, a full 90-day posting is required
- The Department will acknowledge the receipt of the annual submission; however, this methodology is reviewed during the Monitoring Reviews for the Development.

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Utility Allowance: Written Local Estimate


TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS
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April 26, 2020

letter's direct phone is (512) 475-3800
 Email: cara.polle@tdhca.state.tx.us

Hudson Peters
 Woodlands Community, L.P.
 Denver, CO
 hudson.peters@wcdp.com

RE: The Green at Dalhart CMTS ID: 2012


Dear Mr. Peters:

The request to implement an updated utility allowance for The Green at Dalhart was received on April 21, 2020 for calendar year 2020. This satisfies the owner's requirement to notify the Department.

Please be advised, the Department has not reviewed the allowance; the Owner is responsible for ensuring compliance. Monitoring for rents and utility allowances will be included in the property's next regularly scheduled onsite review. If there is noncompliance, corrective action will be required. Please see 10TAC§10.614 for guidance.


The date the Department received this correspondence begins the ninety (90) day notification period. If a resident of the development contacts the Department with relevant information during the notification period, the Department will contact the owner and request additional documentation. Otherwise, the updated utility allowance must be implemented for rent due 90 days after the beginning of the notification period.

Please maintain this correspondence for the property's records. If you have questions please contact Cara Polle at (512) 475-3821 or via email: cara.polle@tdhca.state.tx.us.

Sincerely,

 Cara Polle
 Compliance Monitor

Digitally signed by Cara Polle
 DN: cn=Cara Polle, o=TDHCA, ou=TDHCA, email=cara.polle@tdhca.state.tx.us, c=US
 2020.04.26 10:40:00-0500

221 East 11th Street P.O. Box 13941 Austin, Texas 78711-0941 (800) 525-0657 (512) 475-3800

 **reliant**
 an NRG company

Reliant
 NRG Tower at the Pavilions
 1301 Turner
 Houston, TX 77002

The Green at Dalhart
 971 E. 5th Street
 Dalhart, TX 76022

April 11, 2020

RE: Utility Allowance Estimate


To Whom It May Concern:

In our opinion, as of this date, the monthly utility charge estimates listed below would apply for the above noted property located within the service area of Reliant Energy:

ELECTRIC - Utility Allowances		
	1 BR	2 BR
TOTAL	\$ 54.00	\$ 67.00

NOTES:

1. The above utility allowances are only an estimate.
2. The monthly utility charge estimates are for a unit of similar size and construction for the geographic area in which the building containing the unit is located.
3. The above utility allowances, by bedroom type, apply to all building configurations on this property.
4. Estimates based on an "Energy Conservative Household" and other criteria as defined by the U.S. Department of Housing and Urban Development (HUD).
5. Estimates include costs for heating; cooking; other electric (lighting, etc.); air conditioning; water heating; all monthly component charges.
6. This letter serves as a renewal for the letter previously issued by Reliant Energy dated 04/16/19.

Sincerely,

 David Pace

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Utility Allowance: Energy Consumption Model

Energy Consumption Method (ECM)

- The model must be calculated by a properly licensed mechanical engineer
- The estimate must, at a minimum, take into consideration specific factors that include, but are not limited to, unit size, building type and orientation, design and materials, mechanical systems, appliances, characteristics of building location, and available historical data
- Component charges used must be no older than those in effect 60 days prior to the beginning of the 90-day period described in §10.614(f)(3) related to effective dates
- Beginning of 90-day notification period should be 60 days after the end of the last month of the 12 month period for which data was used to compute the estimate
- Annual review is required and will be approved by the Department if compliant

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Utility Allowance: Energy Consumption Model

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS
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Rita Thomas, Member
Dorcas Thompson, Member

December 2, 2020

HHS-1's email phone # (512) 475-5822
Email: hhs@tdhca.state.tx.us

RE: Pandora Springs
CMTS ID: 6005

Dear Mrs. Hammond:

The Texas Department of Housing and Community Affairs (Department) has received the request submitted on September 28, 2020, by Ryan Property Management for Pandora Springs to calculate the utility allowance using the Energy Consumption Model method described in 10TAC §10.610(i)(3) (D).

Your request is hereby granted. This approval is based on the representation that the residents are financially responsible for electricity, that the utility is not paid to or through the owner of the building based on an allocation formula or RUIB; and, that the Development does not have HUD-regulated buildings, RUS assisted buildings or RUS assisted tenants. Please note that, in accordance with Treasury Regulation §1.42-1(i), the utility allowance for those units occupied by Section 8 voucher holders remains the applicable Public Housing Authority utility allowance established from where the resident receives the assistance.

The Notice to the Residents was posted on September 28, 2020, which begins the 90-day notification period. Please note that a resident of the development could contact the Department with additional information during the notification period. If the information is relevant, the Department may contact the owner and request additional documentation. *The following utility allowances are effective for rent due after December 22, 2020.*

Energy Consumption Model	
1 Bedroom	\$56.00
2 Bedroom	\$67.00

It is the sole responsibility of the owner to implement the allowance to ensure that rents are restricted and, if applicable, all additional rent and occupancy restrictions are met. The Department will review rents during the next on-site monitoring review and, failure to implement timely, will result in noncompliance.

321 East 11th Street P.O. Box 13941 Austin, Texas 78713-3941 (800) 525-0637 (512) 475-5800

Pandora Springs
1211 ABC Broadway
Austin, TX 78711

September 25, 2020

RE: Utility Allowance Estimate

To Whom It May Concern:

In our opinion, as of this date, the monthly utility charge estimates listed below would apply for the above noted property:

Pandora Springs		Energy Consumption Model	
Electric Utility Allowances		1 BR	2 BR
Electric Utility Allowances	\$	55.75	\$ 66.33
TOTAL ALLOWANCES ROUNDED UP	\$	56.00	\$ 67.00

NOTES:

- The above utility allowances were produced using an engineer approved Energy Consumption Model.
- Estimates for electric charges were developed using the local provider rates from United Cooperative Services (UCS). The property is located in a regulated electric market, making UCS the only electric provider available to the property. Component charges used were less than 30 days old as of the date on this letter.
 - Estimates include electric costs for heating, cooking, other electric (lighting, etc.); air conditioning; water heating; all monthly component charges.
- The Energy Consumption Model used for this property takes into consideration, but is not limited to, the following items:
 - Property location
 - Year of construction
 - Unit square footage
 - Unit type based on number of bedrooms
 - Load occupancy based on number of bedrooms
 - Building type
 - Construction materials
 - Wall/ceiling insulation
 - Type/size of HVAC, appliances and water heaters
 - HVAC SEER rating
 - Heating Degree Days
 - Cooling Degree Days
 - Outdoor Design Temperature (Delta T)
 - Indoor Design Temperature
 - Heating Season Hours
 - Degree Day Zone

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Utility Allowance: Actual Use Methodology

Actual Use Methodology

- This is an allowance based on an average of the actual use of similarly constructed and sized units in the building using actual utility data and Component Charges
- Upon receipt of the required information, the Department will determine if the owner has provided the minimum information necessary to calculate using this methodology, the Department will communicate with the development to obtain missing information/documentation
- The Department will complete its evaluation and calculation within 45 days of receipt of all information requested
- The update and all back-up documentation must be submitted to the Department no later than August 1st of each year; however, owners are encouraged to submit prior to the deadline
- Once the Department issues the response the development must then post to the residents on the date that the Department issues the response

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Utility Allowance: Actual Use Methodology

What must be provided:

- A minimum sample size of usage data for at least five continuously occupied units of each unit type or 20% of each unit type; whichever is greater. If there are less than five units of any unit type, data for 100% of the unit type must be provided
- Upload the following documents into the development's CMTS account using data no older than 60 days prior to the 90-day implementation period intended
 - An Excel spreadsheet listing each unit used for the sample size, unit number, number of bedrooms, bathrooms and square footage, household's move-in date, utility usage for each month for the 12-month period, and the Component Charges in place at the time of the submission
 - All documentation obtained from the Utility Provider and/or copies of the actual utility bills
 - Rent Roll showing occupancy as of the end of the month for the month in which the data was requested from the provider
 - Documentation of the current UA used by the development

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Utility Allowance: Actual Use Methodology

RENT ROLL FORM

Manager's Name: _____ Date: _____

Phone: _____

Type of Space	Tenant Name	Total Area (sq. ft.)	Rent/Period	Moving Fee	Lease Start & End Date	Accommodation Total	Notes & Information

Utility Allowance Questionnaire

This form must be completed by all owners requesting to switch utility allowance methodologies and when submitting an allowance for annual review. Please contact Cara Pollei with any questions at (512) 475-3821 or carap@cityofaustin.gov.

			1 Bedroom Electricity			
Unit #	Meter number	Move-In Date	Aug. 2019	Sept. 2019	Oct. 2019	Nov. 2019
1	726	50078242	7/13/2016	168	314	154
2	1038	46346066	5/1/2013	159	183	186
3	1141	43521422	5/31/2019	281	301	275
4	1349	46346057	2/1/2012	319	193	305
5	624	46346070	1/1/2012	273	342	334
6	1765	43520447	11/2/2015	276	333	284

PCRF -0.003665
customer charge of \$15.00
energy charge of \$0.099 per KWH

April 2020	May 2020	June 2020	July 2020	Annual Usage
293	253	132	142	4506
442	398	524	501	6474
435	487	466	269	6394
523	473	463	574	7341
634	575	634	648	8167
Total KWH				32882
5 units X 12 months				60
Average KWH per unit				548.03
Avg Energy Charge				\$67.25
State Tax				\$4.20
City Tax				\$1.34
Avg Monthly Charge				\$72.79

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Utility Allowance: Actual Use Methodology

How the Department will review:

- If the submission contains all required documentation and information, the Department shall calculate the UA for each bedroom size using the guidelines described below
 - If data is obtained for more than the sample requirement for the unit type, **all** data will be used to calculate the allowance
 - If more than 12 months of data is provided for any unit, only the data for the **most current** 12 months will be averaged
 - The allowance will be calculated by multiplying the average units of measure for the applicable utility for all unit types with that bedroom size
 - The allowance will be rounded up to the next whole dollar amount
 - If allowances are calculated for different utilities, each amount will be rounded up to the next whole dollar amount and then added together for the total allowance
 - If the data submitted indicates zero usage for any month, the data for that unit will not be used to calculate the UA

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Utility Allowance: Actual Use Methodology



TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS
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April 28, 2020

Writer's direct phone # (512) 475-3821
Email: cara.pollie@tdhca.state.tx.us

Nicole Martinez
M Street Housing, LP
Austin, TX
nicole@Mstreet.org

RE: M Street Apartments

CMTS ID: 1026

Dear Ms. Martinez:

The Texas Department of Housing and Community Affairs (Department) has received the request submitted on March 25, 2020 and April 24, 2020, by M Street Housing, for M Street Apartments to calculate the water and sewer portion of the utility allowance using the Actual Use Method as described in 10TAC§10.614(i)(3)(E).

Your request is hereby granted. This approval is based on the following representations: (1) that the residents are financially responsible for electricity, gas, water and sewer and that the utilities are not paid to or through the owner of the building based on an allocation formula or RUIB; and (2) that the buildings are not Rural Housing Services (RHS) buildings. Please note that the utility allowance for those units occupied by Section 8 voucher holders remains the applicable Public Housing Authority utility allowance established from where the resident receives the assistance.

In accordance with 10TAC§10.614(f)(3), receipt of approval from the Department will begin the ninety (90) day period after which the new utility allowance must be used to compute gross rent. Upon receipt of this approval, Notice to the Residents must be posted in common area of the leasing office of the development. Please note that a resident of the development could contact the Department with additional information during the ninety (90) day notification period. If the information is relevant, the Department may contact the owner and request additional documentation. *The following allowances are effective for rent due after July 27, 2020:*


221 East 11th Street P.O. Box 13941 Austin, Texas 78711-3941 (800) 525-0637 (512) 475-3800

	Water (Actual Use)
1 Bedroom	\$12.00
2 Bedroom	\$18.00
3 Bedroom	\$22.00

	Sewer
1 Bedroom	\$18.00
2 Bedroom	\$30.00
3 Bedroom	\$36.00

Please be advised that Owners must update the allowance once a calendar year. In accordance with 10TAC§10.614(j)(5), the update and all back up documentation required by the method must be submitted to the Department no later than August 1st of each year but are encouraged to submit prior to the deadline to ensure the Department has time to review.

If you have any further questions, please contact Cara Pollie at (512) 475-3821 or via email: cara.pollie@tdhca.state.tx.us.

Sincerely,

Cara Pollie
Compliance Monitor

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Utility Allowance: HUD Utility Schedule Model

HUD Utility Schedule Model (HUSM) Method

- The HUD Model and related resources can be found at <http://www.huduser.gov/portal/resources/utilallowance.html>
 - Each item on the schedule must be displayed out two decimal places. The total allowance must be rounded up to the next whole dollar amount.
- The component charges used can be no older than those in effect 60 days prior to the beginning of the 90-day period described in §10.614(f)(3) related to effective dates
- The beginning of the 90-day notification period is the date entered as “Form Date” on the HUD Model
- The allowance must be calculated using the MS Excel version available at the URL above, with no changes or adjustments made other than entry of the required information needed to complete the model

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Utility Allowance: HUD Utility Schedule Model

HUD Utility Schedule Model (HUSM) Method continued

- In the event that the Zip Code or PHA Code for the local PHA to the development is not listed in the “Location” of the workbook, the Department will use the PHA code for the PHA that is closest in distance to the development
- If the owner elects any of the Green Discount options for a development, documentation to evidence that the units and the buildings meet the Green Discount standard as prescribed in the model is required for the initial approval and every subsequent annual review
- Do not take into consideration any costs or credits that a consumer would incur because of their actual usage
- During the annual review the Department will complete a HUD Model and issue an approval, partial approval or denial. The HUD Model will be attached to the approval letter

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Utility Allowance: HUD Utility Schedule Model

“Location” Tab of HUD Model

- Enter the Zip Code of the development, if the Zip Code is not available, enter the PHA Code; which can be found at https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf
- Enter the property name in the next box for “Name of Housing Authority/City”
- State should remain TX
- Enter the date that you are preparing the HUD Model as the “Form Date”

The Climate Data will automatically populate based on the zip code or PHA code that is entered in the first box of this tab. The data in this section should not be changed or edited for any reason.

Climate Data (Degree Days)		
HDD Jan	368	required
HDD Feb	247	required
HDD Mar	117	required
HDD Apr	25	required
HDD May	1	required
HDD Jun	0	required
HDD Jul	0	required
HDD Aug	0	required
HDD Sep	0	required
HDD Oct	22	required
HDD Nov	135	required
HDD Dec	322	required
HDD Annual	1237	

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Utility Allowance: HUD Utility Schedule Model

To Obtain the Rates for the area when deregulated:

- Visit <http://powertochoose.com/en-us> and enter the zip code
 - If no plans are available then the rates must be obtained from the provider for the area
- Click "View Results" and select the plan to be used for the HUD Model
- Click "Fact Sheet" for the desired plan, this will need to be submitted with the HUD Model for review

The screenshot displays the PowerToChoose website interface. On the left, the search results page shows the zip code 77027 entered, resulting in 185 plans found. A large white arrow points from the 'VIEW RESULTS' button to the right panel. The right panel shows a list of plans, with the 'Sustainable Living Bundle' selected. A large white arrow points from the 'Fact Sheet' link in the plan details to the right panel.

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Utility Allowance: HUD Utility Schedule Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020				
Electricity Price (Residential)	Average monthly use:	500 kWh	1000 kWh	2000 kWh
	Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢
	The average price per kWh is based on the usage levels shown above and includes the following components of the price: • Energy Charge: 2¢/kWh • Pass-Through TDSP Distribution Charge: 4.2359¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 • One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above.			
	Your average price for electric service will vary according to your monthly usage. The one-time terrapass setup and carbon offset purchase is required to enroll on this product. This \$14.99 set up fee includes terrapass account set up and 1 metric ton of carbon offsets; however, the subscription and set up fee will be charged separately by terrapass. A customer interested in continuing to offset his or her carbon footprint will have the option to enroll in a terrapass subscription separately from this product. For more information, visit https://www.terrapass.com/individuals/sustainable-living . The average price per kWh does not include JustGreen. JustGreen is an optional program that offsets electricity usage with renewable energy credits for 100% renewable content. While it is not common, some renewable projects could be part of both terrapass and JustGreen. JustGreen renewable energy credits may overlap with terrapass. The price does not include federal, state, or local sales taxes or fees, reimbursement for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSP Underground Facilities and Cost Recovery Charge authorized by these city that is not included in the total average price shown. For more details, see the TDSP service tariff for a listing of cities and authorized charges.			
Other Keys and Terms and Questions	See Terms of Service statement for a full listing of fees, deposit policy, and other terms			
Disclosure Chart	Type of Product	Fixed Rate		
	Contract Term	4 Month		
	Do I have a termination fee or any fees associated with terminating service?	Yes: \$14.99		
	Can my price change during the contract period?	Yes, but only if the TDSP charges change		
	If my price can change, how will it change and by how much?	Your price will change if the TDSP charges change. The price does not include federal, state, or local sales taxes or fees, reimbursement for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSP Underground Facilities and Cost Recovery Charge authorized by these city that is not included in the total average price shown. For more details, see the TDSP service tariff for a listing of cities and authorized charges.		
	What other fees may I be charged?	There are no other fees associated with this product.		
	Is this a pre-pay or pay in advance product?	No		
	Does the REP purchase excess distributed renewable generation?	Yes		
	Renewable Content	12.4%		
	The statewide average for renewable content is	20.7%		
	Just Energy, Texas L.P. d/b/a Just Energy P.O. Box 460008, Houston, Texas 77256 www.justenergy.com (866) 557-6874 PUCT License # 10052 Monday - Friday: 8:00 am to 6:00 pm CST Saturday: 8:00 am to 6:00 pm CST			

Electricity Facts Label (EFL)

- This data will be used on the "Tariffs" tab of the HUD Model
- If the TDSP pass-through charges are not on the EFL chosen, those must be obtained from TDSP
- If there is not an effective date the EFL cannot be used for the HUD Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020			
Average monthly use:	500 kWh	1000 kWh	2000 kWh
Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢
The average price per kWh is based on the usage levels shown above and includes the following components of the price: • Energy Charge: 2¢/kWh • Pass-Through TDSP Distribution Charge: 4.2359¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 • One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above.			

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Utility Allowance: HUD Utility Schedule Model

<https://www.puc.texas.gov/industry/electric/rates/tldr.aspx>

Public Utility Commission of Texas

Home Consumer Industry Rules & Laws Filings Agency

Electric

Industry Information > Electricity > Rates and Tariffs > Tariffs for Service

Transmission and Distribution Rates for Investor Owned Utilities

Tariffs for Service

Transmission and Distribution Utilities (TDUs) must offer access to their wires to all REPs on a non-discriminatory basis under standard terms and conditions adopted by the Commission.

These areas are open to full retail competition as of January 1, 2002, and these TDUs charge the below rates to REPs.

Tariffs will only be updated twice a year (after the March and September TCRP filings) except in the event of a Final Order in a major rate case. The Summary of Non-Bypassable Charges (linked below) will be updated more frequently, but not on any set schedule.

Compliance Docket - Utility

48401 - TNMP

46057 - Oncor Electric Delivery Company

35093 - AEP Texas Central Division

33310 - AEP Texas North Division

49421 - CenterPoint

The utility area below is not currently open to full retail competition until the Commission finds that the area is ready to open below rates during the ongoing pilot project.

Effective for Extended Pilot Project

UCOS Compliance Docket - Utility

23924 - SHERCO

Summary of Current Commission-Approved Charges for ERCOT TDUs

as of March 1, 2020. (PLEASE NOTE: THESE MAY NOT BE THE MOST CURRENT TDU CHARGES, AND MAY NOT INCLUDE ALL TDU CHARGES IN EFFECT. RETAIL ELECTRIC PROVIDERS SHOULD NOT RELY UPON THIS INFORMATION IN COMPLYING ELECTRICITY FACTS LABEL RATES.)

Archived TDU Rates Summaries

The link will take you to a report that is 8 pages long, you will need to go to the last page to get the totals for your area. This is only necessary if the EFL that you select from the Power to Choose website does not already list the TDU charges. The information you need, as shown below, is the Total Delivery Rate and the Monthly Customer Charges. These will be input as the Monthly Charge and Extra Charges on the Tariff Tab of the HUD Model.

Public Utility Commission of Texas
Updated: March 1, 2020

Schedule Commission-7

RESIDENTIAL DELIVERY CHARGES--Total Monthly Bill Amount per 1,000 kWh

	Oncor	CenterPoint	AEP Central	AEP North	TNMP
Total Delivery Rate (per kWh)	\$0.035271	\$0.034485	\$0.042286	\$0.035805	\$0.041194
Total kWh charges per 1,000 kWh	\$35.27	\$34.49	\$42.29	\$35.81	\$41.19
Monthly Customer Charges (\$\$)	\$3.42	\$5.47	\$4.79	\$4.79	\$7.85
Total Residential Delivery Charges (1,000 kWh)	\$38.69	\$39.96	\$47.08	\$40.60	\$49.04

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Utility Allowance: HUD Utility Schedule Model

"Tariffs" Tab of HUD Model

- Enter the date at the top under "Current"
- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- *For this example the rate is same all year; however, if there were different rates the summer start and end would need to be entered*
- Monthly Charge is the TDSP and provider monthly fee
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- *For this example there is no winter/summer rate*
- Extra Charges are the TDSP and provider "extra" charges
- Taxes include the state electric tax, population tax and city tax (if the city charges)

Previous **Current**

Date Entered: July 31, 2015 December 7, 2020

Standard Electric Utility Tariff

Utility Name: Just Energy

Rate Name: Sustainable Living Bundle 4

Rate Effective Date: December 7, 2020

First Month of Summer: January 1

Last Month of Summer: December 12

Monthly Charge: \$4.39 \$/month

Summer

Size of First Block: remainder kWh

Size of Second Block: kWh

Size of Third Block: kWh

Size of Fourth Block: kWh

Cost of First Block: 0.02 \$/kWh

Cost of Second Block: \$/kWh

Cost of Third Block: \$/kWh

Cost of Fourth Block: \$/kWh

Winter

Size of First Block: kWh

Size of Second Block: kWh

Size of Third Block: kWh

Size of Fourth Block: kWh

Cost of First Block: \$/kWh

Cost of Second Block: \$/kWh

Cost of Third Block: \$/kWh

Cost of Fourth Block: \$/kWh

Extra Charges: \$0.042359 \$/kWh

Taxes: 3.1637 %

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Utility Allowance: HUD Utility Schedule Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020			
Average monthly use:	500 kWh	1000 kWh	2000 kWh
Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢
Electricity Price (Residential)	<p>The average price per kWh is based on the usage levels shown above and includes the following components of the price:</p> <ul style="list-style-type: none"> • Energy Charge: 4¢/kWh • Pass-Through TDSP Distribution Charge: 4.235¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 • One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above. <p>Your average price for electric service will vary according to your monthly usage.</p> <p>The one-time terrapass setup and carbon offset purchase is required to enroll on this product. This \$14.99 set up fee includes terrapass account set up and 1 metric ton of carbon offsets; however, the subscription and set up fee will be charged separately by terrapass. A customer interested in continuing to offset his or her carbon footprint will have the option to enroll in a terrapass subscription separately from this product. For more information, visit https://www.terrapass.com/individuals/sustainable-living.</p> <p>The average price per kWh does not include JustGreen. JustGreen is an optional program that offsets electricity usage with renewable energy credits for 100% renewable content. While it is not common, some renewable projects could be part of both terrapass and JustGreen. JustGreen renewable energy credits may overlap with terrapass.</p> <p>The price does not include federal, state, or local sales taxes or fees, reimbursement for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSP Underground Facilities and Cost Recovery Charge authorized by their city that is not included in the total average price shown. For more details, see the TDSP service tariff for a listing of cities and authorized charges.</p>		
Other Keys and Terms and Questions	<p>See Terms of Service statement for a full listing of fees, deposit policy, and other terms.</p> <p>Type of Product: Fixed Rate Product</p> <p>Contract Term: 4 Months</p> <p>Do I have a termination fee or any fees associated with terminating service? Yes; The Exit fee is \$175 per ESHD.</p> <p>Can my price change during the contract period? Yes, but only in the limited circumstances described below.</p> <p>If my price can change, how will it change and by how much? Your price can change to reflect changes in TDSP charges, changes to the ERCOT or Texas Regional Entity administrative fees charged to loads or changes resulting from federal, state, or local laws that impose new or modified fees or costs on Just Energy that are beyond our control.</p> <p>What other fees may I be charged? Fees not included in above price: Agent Assist Fee: \$5 each time a customer service agent helps you make a payment. Disconnection Fee: \$25. Disconnection Notice Fee: \$20. Insufficient Funds Charge: \$25. Late Fee: 5% of your late bill's past due amount. Please see TOS for additional information regarding fees charged by TDSP. JustGreen: Please see "JE Justify" section in your Terms of Service for more details.</p> <p>Is this a pre-pay or pay in advance product? No.</p> <p>Does the REP purchase excess distributed renewable generation? Yes.</p> <p>Renewable Content: 12.4%.</p> <p>The statewide average for renewable content is: 20.7%.</p>		
Disclosure Chart	<p>Just Energy Texas L.P. d/b/a Just Energy P.O. Box 400008, Houston, Texas 77056 www.JustEnergy.com (866) 587-8674 P.U.C.T. License # 10052</p> <p>Monday - Friday: 8:00 am to 8:00 pm CST Saturday: 8:00 am to 6:00 pm CST</p>		

Previous		Current	
Date Entered	July 31, 2015	December 7, 2020	
Standard Electric Utility Tariff			
Utility Name	Just Energy		
Rate Name	Sustainable Living Bundle 4		
Rate Effective Date	December 7, 2020		
First Month of Summer	January	January	Select J
Last Month of Summer	December	December	Select D
Monthly Charge	4.39 \$/month		
Summer			
Size of First Block	remainder kWh		
Size of Second Block	kWh		
Size of Third Block	kWh		
Size of Fourth Block	kWh		
Cost of First Block	0.02 \$/kWh		
Cost of Second Block	\$/kWh		
Cost of Third Block	\$/kWh		
Cost of Fourth Block	\$/kWh		
Winter			
Size of First Block	kWh		
Size of Second Block	kWh		
Size of Third Block	kWh		
Size of Fourth Block	kWh		
Cost of First Block	\$/kWh		
Cost of Second Block	\$/kWh		
Cost of Third Block	\$/kWh		
Cost of Fourth Block	\$/kWh		
Extra Charges	0.042359 \$/kWh		
Taxes	3.1637 %		

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Utility Allowance: HUD Utility Schedule Model

CENTERPOINT ENERGY RESOURCES CORP.
DBA CENTERPOINT ENERGY ENTERPRISE
AND CENTERPOINT ENERGY TEXAS GAS
HOUSTON DIVISION - INCORPORATED
KATE SHEET
RESIDENTIAL SERVICE
RATE SCHEDULE NO. R-2095-I-GRIP 2020

APPLICATION OF SCHEDULE

This schedule is applicable to any customer in an incorporated area including a city that has ceded jurisdiction to the Commission in the Houston Division to whom service is supplied as a single private dwelling unit and its appurtenances, the major use of which is for household appliances, and for the personal comfort and convenience of those residing therein.

Natural gas supplied hereunder is for the individual use of the customer at one point of delivery and shall not be resold or shared with others.

MONTHLY RATE

For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:

MONTHLY RATE

For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:

(a) The Base Rate consisting of:

(1) Customer Charge - \$17.39¹

(2) Commodity Charge - All Ccf \$0.07196²

(b) Tax Adjustment - The Tax Adjustment will be calculated and adjusted periodically as defined in the Company's applicable Tax Adjustment Rate Schedule and Franchise Fee Adjustment Rate Schedule.

(c) Gas Cost Adjustment - The applicable Purchased Gas Adjustment (PGA) Rate - as calculated on a per Ccf basis and adjusted periodically under the applicable Purchased Gas Adjustment (PGA) Rate Schedule - for all gas used.

(d) Rate Case Expense Recovery - Rate Case Expense Recovery will be calculated and adjusted periodically as defined in the Company's applicable Rate Case Expense Recovery Rate Schedule.

Houston-Controne (14.95 Pressure Base)(PGA)
Houston-Controne (14.95 Pressure Base)(Storage)
Houston-Controne (14.95 Pressure Base)(Total Filed with RRC)

November-20

R-2095-I-GRIP 2020 & R-2095-U-GRIP 2020
\$0.47587/Ccf
\$0.00163/Ccf
\$0.47750/Ccf

Notes:
1. Ccf
2. Ccf
3. Ccf
4. Ccf
5. Ccf

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Natural Gas Services

- This data will be used on the "Tariffs" tab of the HUD Model
- Obtain the rates from the Natural Gas provider's website
- Include all charges that would be present on the tenant's utility bill

Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- Measurement Units – select based on the rate plan
- *For this example the rate is same all year; however, if there were different rates the summer start and end would need to be entered*
- Monthly Charge is the Customer Charge
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- *For this example there is no winter/summer rate*
- Extra Charges are the additional charges outlined on the rate sheet
- Taxes include the state gas tax, population tax and city tax (if the city charges)

Standard Natural Gas Utility Tariff

Utility Name	Centerpoint Energy	
Rate Name	Residential	
Rate Effective Date	December 10, 2020	
Measurement Units	CCF	2
First Month of Summer	January	January
Last Month of Summer	December	December
Monthly Charge	17.39	\$/month
Summer		
Size of First Block	remainder	CCF
Size of Second Block		CCF
Size of Third Block		CCF
Size of Fourth Block		CCF
Cost of First Block	0.07196	\$/CCF
Cost of Second Block		\$/CCF
Cost of Third Block		\$/CCF
Cost of Fourth Block		\$/CCF
Winter		
Size of First Block		CCF
Size of Second Block		CCF
Size of Third Block		CCF
Size of Fourth Block		CCF
Cost of First Block		\$/CCF
Cost of Second Block		\$/CCF
Cost of Third Block		\$/CCF
Cost of Fourth Block		\$/CCF
Extra Charges	0.4775	\$/CCF
Taxes	3.1637	%

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Utility Allowance: HUD Utility Schedule Model

MONTHLY RATE

For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:

- The Base Rate consisting of:
 - (1) Customer Charge – \$17.39¹
 - (2) Commodity Charge – All Ccf \$0.07196²
- Tax Adjustment – The Tax Adjustment will be calculated and adjusted periodically as defined in the Company's applicable Tax Adjustment Rate Schedule and Franchise Fee Adjustment Rate Schedule.
- Gas Cost Adjustment – The applicable Purchased Gas Adjustment (PGA) Rate – as calculated on a per Ccf basis and adjusted periodically under the applicable Purchased Gas Adjustment (PGA) Rate Schedule – for all gas used.
- Rate Case Expense Recovery – Rate Case Expense Recovery will be calculated and adjusted periodically as defined in the Company's applicable Rate Case Expense Recovery Rate Schedule.

Houston-Conroe (14.95 Pressure Base)(PGA)	November-20	R-2095-I-GRIP 2020 & R-2095-U-GRIP 2020	\$0.47587/Ccf
Houston-Conroe (14.95 Pressure Base)(Storage)			\$0.00163/Ccf
Houston-Conroe (14.95 Pressure Base)(Total Filed with RRC)			\$0.47750/Ccf

Standard Natural Gas Utility Tariff

Utility Name	Centerpoint Energy	
Rate Name	Residential	
Rate Effective Date	December 10, 2020	
Measurement Units	CCF	2
First Month of Summer	January	January
Last Month of Summer	December	December
Monthly Charge	17.39	\$/month
Summer		
Size of First Block	remainder	CCF
Size of Second Block		CCF
Size of Third Block		CCF
Size of Fourth Block		CCF
Cost of First Block	0.07196	\$/CCF
Cost of Second Block		\$/CCF
Cost of Third Block		\$/CCF
Cost of Fourth Block		\$/CCF
Winter		
Size of First Block		CCF
Size of Second Block		CCF
Size of Third Block		CCF
Size of Fourth Block		CCF
Cost of First Block		\$/CCF
Cost of Second Block		\$/CCF
Cost of Third Block		\$/CCF
Cost of Fourth Block		\$/CCF
Extra Charges	0.4775	\$/CCF
Taxes	3.1637	%

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Utility Allowance: HUD Utility Schedule Model

Multi-Family – TU 14-19:

- 14 (duplex – 2 units)
- 15 (tri-plex – 3 units)
- 16 (quad-plex – 4 units)
- 17 (master-metered townhomes – any number of units)
- 18 (apartments — 5+ units)
- 19 (trailer parks)

Consumption is no longer included with the basic charge. The volume charges are applied to all usage.

Rate	Meter size (Inches)	Basic Water Charge	Basic Sewer Charge
Basic Charge (0 consumption)	5/8	\$5.96	\$10.48
	¾	\$6.14	\$10.48
	1	\$7.39	\$11.01
	1.5	\$11.18	\$12.76
	2	\$13.16	\$13.29
	3	\$34.83	\$23.81
	4	\$47.47	\$26.97
	6	\$81.37	\$38.54
	8	\$212.45	\$93.60
	10	\$212.45	\$113.76
Volume Charge	All	+ \$4.58 per 1,000 gallons	+ \$6.66 per 1,000 gallons

Water & Sewer Supply Tariffs

- This data will be used on the “Tariffs” tab
- Obtain the rates from the water/sewer provider’s website
- Include all charges that would be present on the tenant’s utility bill
- Use the smallest meter size, unless you can evidence a different sized meter and how the meter is shared

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Effective Date
- Measurement Units – select based on the rate plan
- Monthly Charge is the Base Charge for Water
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- Extra Charges are the additional charges outlined on the rate sheet; this example does not have any
- Taxes are generally not charged on water/sewer
- Since water is billed on a “per 1,000 gallons” the rates must be converted into the appropriate amount. $\$4.58/1000 = .00458$ per gallon in this case

Water Supply Tariff			
Supplier Name	<input type="text" value="City of Houston"/>		
Effective Date	<input type="text" value="April 1, 2020"/>		
Measurement Units	<input type="text" value="Gallons"/>		
Monthly Charge	<input type="text" value="5.96"/>		\$/month
Size of First Block	<input type="text" value="remainder"/>		Gallons
Size of Second Block	<input type="text"/>		Gallons
Size of Third Block	<input type="text"/>		Gallons
Size of Fourth Block	<input type="text"/>		Gallons
Cost of First Block	<input type="text" value="0.00458"/>		\$/Gallons
Cost of Second Block	<input type="text"/>		\$/Gallons
Cost of Third Block	<input type="text"/>		\$/Gallons
Cost of Fourth Block	<input type="text"/>		\$/Gallons
Extra Charges	<input type="text"/>		\$/Gallons
Taxes	<input type="text"/>		%

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Utility Allowance: HUD Utility Schedule Model

Multi-Family – TU 14-19:

- 14 (duplex – 2 units)
- 15 (tri-plex – 3 units)
- 16 (quad-plex – 4 units)
- 17 (master-metered townhomes – any number of units)
- 18 (apartments — 5+ units)
- 19 (trailer parks)

Consumption is no longer included with the basic charge. The volume charges are applied to all usage.

Rate	Meter size (Inches)	Basic Water Charge	Basic Sewer Charge
Basic Charge (0 consumption)	5/8	\$5.96	\$10.48
	¾	\$6.14	\$10.48
	1	\$7.39	\$11.01
	1.5	\$11.18	\$12.76
	2	\$13.16	\$13.29
	3	\$34.83	\$23.81
	4	\$47.47	\$26.97
	6	\$81.37	\$38.54
	8	\$212.45	\$93.60
	10	\$212.45	\$113.76
Volume Charge	All	+ \$4.58 per 1,000 gallons	+ \$6.66 per 1,000 gallons

Water & Sewer Supply Tariffs

- This data will be used on the “Tariffs” tab
- Obtain the rates from the water/sewer provider’s website
- Include all charges that would be present on the tenant’s utility bill
- Use the smallest meter size, unless you can evidence a different sized meter and how the meter is shared

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Effective Date
- Measurement Units – select based on the rate plan
- Monthly Charge is the Base Charge for Sewer
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- Extra Charges are the additional charges outlined on the rate sheet; this example does not have any
- Taxes are generally not charged on water/sewer
- Since sewer is billed on a “per 1,000 gallons” the rates must be converted into the appropriate amount. $\$6.66/1000 = .00666$ per gallon in this case

Sewer Tariff

Sewer Charge Included in Water Tariff ☐ FALSE

Sewer Service Name City of Houston

Effective Date April 1, 2020

Measurement Units Gallons

Monthly Charge 10.48 \$/month

Size of First Block remainder Gallons

Size of Second Block Gallons

Size of Third Block Gallons

Size of Fourth Block Gallons

Cost of First Block 0.00666 \$/Gallons

Cost of Second Block \$/Gallons

Cost of Third Block \$/Gallons

Cost of Fourth Block \$/Gallons

Extra Charges \$/Gallons

Taxes %

If the rates indicate that there is a “cap” for sewer charges, the Department will utilize the cap on the form for purposes of calculating sewer.

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Utility Allowance: HUD Utility Schedule Model

Building Characteristics

Unit Type:

Schedule Type:

Electric Tariff:

Green Discount*:
*Choose LEED or ENERGY STAR if the building meets that certification.
 Choose Significant Green Retrofit if the building had energy saving rehabilitation to any of the following systems in the last 5 years:
 (1) heating, (2) cooling, (3) lighting, (4) DHW systems, (5) appliances, (6) building envelope, (7) water measures, and/or (8) on-site generation

Print the form shown below for the selected unit type
 Projected Family Allowances To be used to compute specific family allowances.

Unit size:

Utility or Service	Fuel Source
Space Heating	Electric Resistance
Cooking	Natural Gas
Other Electric	Electric
Air Conditioning	Electric
Water Heating	Natural Gas
Water	Tenant pays
Sewer	Tenant pays
Trash Collection	Not Applicable
Range/Microwave	Not Applicable
Refrigerator	Not Applicable
Other	Not Applicable

Most of the errors are caused by incorrect selections on this section of the tab. This section should match the Utility Allowance Questionnaire and will allow the final tab to populate correctly.

Building Characteristics

- Select the "Building Characteristics" tab
- Unit Type
- Schedule Type and Electric Tariff should not change
- Green Discount; this is only selected if the appropriate back-up documentation can be provided to show that the building meets the requirements
- Utilities and Sources should be selected as is applicable to the development

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Utility Allowance: HUD Utility Schedule Model

Print the form shown below for the selected unit type
 Create copies of this worksheet for other unit types

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing

Locality: Green Discount: Unit Type: Date (mm/dd/yyyy):

Utility or Service

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Space Heating						
Natural Gas						
Bottled Gas						
Electric Resistance	\$8.64	\$9.40	\$10.34	\$11.28	\$12.22	\$13.17
Electric Heat Pump						
Fuel Oil						
Cooking	\$18.96	\$19.23	\$20.06	\$20.88	\$21.70	\$22.53
Natural Gas						
Bottled Gas						
Electric						
Other						
Other Electric	\$9.93	\$11.68	\$16.25	\$20.82	\$25.39	\$29.96
Air Conditioning	\$8.51	\$10.01	\$13.88	\$17.75	\$21.61	\$25.48
Water Heating	\$3.27	\$3.84	\$5.55	\$7.26	\$8.97	\$10.68
Natural Gas						
Bottled Gas						
Electric						
Fuel Oil						
Water	\$32.78	\$35.76	\$55.63	\$85.43	\$115.24	\$145.04
Sewer	\$49.48	\$53.82	\$82.71	\$126.05	\$169.38	\$212.72
Trash Collection						
Range/Microwave						
Refrigerator						
Other - specify						
Total	\$131.57	\$143.74	\$204.41	\$289.46	\$374.51	\$459.57
Total Allowance (Rounded Up)	\$132.00	\$144.00	\$205.00	\$290.00	\$375.00	\$460.00

The schedule above has allocated any monthly fees from tariffs into the first instance they are selected in the Building Characteristics sheet.
 Note: If no utility has been selected monthly allowances can be found in space heating. (For an electric heat source, it is in Electric Resistance.)

HUD-52667 Form

- You can clear the data that does not apply
 - Space heating is Resistance so we do not need the other numbers in that section
- Make sure you do not delete an applicable line
 - If you remove Air Conditioning you will not have a correct UA
- The bottom number in the yellow line is the applicable UA for the unit size

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Utility Allowance: HUD Utility Schedule Model

“Location” Tab of HUD Model

- Enter the Zip Code of the development, if the Zip Code is not available, enter the PHA Code; which can be found at https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf
- Enter the property name in the next box for “Name of Housing Authority/City”
- State should remain TX
- Enter the date that you are preparing the HUD Model as the “Form Date”

The Climate Data will automatically populate based on the zip code or PHA code that is entered in the first box of this tab. The data in this section should not be changed or edited for any reason.

General Information		
PHA/Zip Code*	Lookup	78210
*If zip code is unavailable, choose adjacent zip code.		
Name of Housing Authority/City	San Antonio	
State	TX	
Form Date	January 5, 2021	
Include Allowance for Air Conditioning	<input checked="" type="checkbox"/>	

Climate Data (Degree Days)		
HDD Jan	329	required
HDD Feb	264	required
HDD Mar	135	required
HDD Apr	30	required
HDD May	1	required
HDD Jun	0	required
HDD Jul	0	required
HDD Aug	0	required
HDD Sep	1	required
HDD Oct	22	required
HDD Nov	155	required
HDD Dec	309	required
HDD Annual	1411	
CDD Jan	7	required
CDD Feb	22	required
CDD Mar	12	required
CDD Apr	184	required
CDD May	387	required
CDD Jun	528	required
CDD Jul	596	required
CDD Aug	645	required
CDD Sep	440	required

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Utility Allowance: HUD Utility Schedule Model

To Obtain the Rates for the area when regulated:

- Visit the provider's website (this will vary for each area); for this example we are using San Antonio.
- If you are unable to find the rates on the provider's website, email or call the provider for the location of the rates. Please do not simply use the rates from a current bill.

Rates

Residential Rates and Regulations

The following documents explain our electric and gas rates for residential customers, including any additional charges that may appear on your bill:

- Residential Electric Rate
- Residential All-Electric Rate (Available only to all-electric homes with active CPS Energy accounts on this rate prior to June 2006)
- Large Use Residential Capacity Energy
- Rules and Regulations Applying to Retail Electric and Gas Service
- Policy for Miscellaneous Charges

Commercial Rates and Regulations

As a commercial customer of CPS Energy, you should be aware of various fuel and regulatory charges as well as several different electric and gas rates that may apply to your company and may be included as additional charges on your company's bill. Your business also may be exempt from paying state sales and use taxes for electric or natural gas services.

- Residential and Base Commercial Gas Rate
- Class B Gas Rate
- Large Volume Gas Rate
- Rules and Regulations for Retail Electric and Gas
- General Service Base Commercial Electric Rate
- Extra Large Power Service Rate
- Large Lighting and Power Service Rate
- Policy for Miscellaneous Charges

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Utility Allowance: HUD Utility Schedule Model

Effective: February 1, 2020 Page 1 of 2

CPS Energy

RESIDENTIAL SERVICE
ELECTRIC RATE

RE

APPLICATION

This rate is applicable to all originating current service for residential purposes only, to any Customer whose entire residential requirements are the provision are supplied at one point of delivery through one meter.

When a portion of a residence or household use served through one meter is used for non-residential purposes, this rate is not applicable. However, if the wiring is so arranged that the service for residential purposes and that for non-residential purposes are separately metered, this rate is applicable to the service supplied for residential purposes.

This rate is not applicable to service for loads or to service for hotels, rooming houses, boarding houses, hotels, dormitories, or to premises used for other than residential purposes.

This rate is not applicable when more than three residential units are served through one meter.

TYPE OF SERVICE

The types of service available under this rate are described in CPS Energy's rate schedule and voltage are not subject to the provisions of CPS Energy's Rate and Regulation Applying to Retail Electric & Gas Service.

MONTHLY BILL

Rate

\$ 8.75 Service Availability Charge

Energy Charge

\$ 0.0691 Per KWH for all KWH

Peak Capacity Charge*

\$ 0.0198 Per KWH for all KWH in excess of 600 KWH

*Peak Capacity Charge is applicable only during the summer billing period (June - September).

Minimum Bill

\$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.

Adjustments

Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:

Residential Service Electric Rate

- If the provider has multiple residential plans, you must use the rate plan that applies to ALL tenants
- If there are additional items included (riders, etc.) you must include all that are applicable

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Utility Allowance: HUD Utility Schedule Model

Effective: February 1, 2020 Page 1 of 2

CPS Energy

RESIDENTIAL SERVICE
ELECTRIC RATE

RE

APPLICATION

This rate is applicable to all originating current service for residential purposes only, to any Customer whose entire residential requirements are the provision are supplied at one point of delivery through one meter.

When a portion of a residence or household use served through one meter is used for non-residential purposes, this rate is not applicable. However, if the wiring is so arranged that the service for residential purposes and that for non-residential purposes are separately metered, this rate is applicable to the service supplied for residential purposes.

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TYPE OF SERVICE

The types of service available under this rate are described in CPS Energy's rate schedule and voltage are not subject to the provisions of CPS Energy's Rate and Regulation Applying to Retail Electric & Gas Service.

MONTHLY BILL

Rate

\$ 8.75 Service Availability Charge

Energy Charge

\$ 0.0691 Per KWH for all KWH

Peak Capacity Charge*

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*Peak Capacity Charge is applicable only during the summer billing period (June - September).

Minimum Bill

\$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.

Adjustments

Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:

Fuel Cost Factor

- This is not always on the rate sheet, you will need to locate it on the provider's website or through email

Retail Electric Fuel/Regulatory Adjustment Factors

Rate Class	January 2021			January 2020
	Retail Electric Fuel Adj. Factor (per kWh)	Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)
RES	\$ 0.01569	\$ 0.01159	\$ 0.02728	\$ 0.01972
PLP	0.01569	0.00961	0.02530	0.01785
LLP	0.01569	0.00821	0.02390	0.01662
ELP/LPT	0.01569	0.00667	0.02236	0.01597
SLP	0.01569	0.00637	0.02206	0.01562
TS	0.01569	0.00566	0.02135	0.01464
STLT & ANSL	0.01569	0.00075	0.01644	0.01001

Effective August 2009, the electric fuel adjustment factor includes the STEP surcharge.
Regulatory Adjustment Factors effective February 1, 2020.

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Enter the date at the top under “Current”
- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- *For this example the rate is different for the summer;* so we need to enter the months that the plan states are the “summer months”
- Monthly Charge is the Service Availability Charge
- Size of blocks should correspond with the rate sheet
- Cost of blocks will correspond with the rate sheet
- *For this example there is a winter/summer rate*
- Extra Charges are the Fuel/Regulatory Adjustment Factors
- Taxes include the state electric tax, population tax and city tax (if the city charges, which San Antonio does not)

Previous		Current	
Date Entered	July 31, 2015	January 5, 2021	
Standard Electric Utility Tariff			
Utility Name	CPS Energy		
Rate Name	Residential		
Rate Effective Date	February 1, 2014		
First Month of Summer	January	June	Select Ja
Last Month of Summer	December	September	Select D
Monthly Charge		8.75	\$/month
Summer			
Size of First Block		600	kWh
Size of Second Block		remainder	kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block		0.0691	\$/kWh
Cost of Second Block		0.0889	\$/kWh
Cost of Third Block			\$/kWh
Cost of Fourth Block			\$/kWh
Winter			
Size of First Block		remainder	kWh
Size of Second Block			kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block		0.0691	\$/kWh
Cost of Second Block			\$/kWh
Cost of Third Block			\$/kWh
Cost of Fourth Block			\$/kWh
Extra Charges		0.02728	\$/kWh
Taxes		2.1637	%

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Utility Allowance: HUD Utility Schedule Model

MONTHLY BILL	
Rate	
\$ 8.75	Service Availability Charge
Energy Charge	
\$ 0.0691	Per KWH for all KWH
Peak Capacity Charge*	
\$ 0.0198	Per KWH for all KWH in excess of 600 KWH
*Peak Capacity Charge is applicable only during the summer billing period (June - September).	
Minimum Bill	
\$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.	
Adjustments	
Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:	

Retail Electric Fuel/Regulatory Adjustment Factors

Rate Class	January 2021			January 2020	
	Retail Electric Fuel Adj. Factor (per kWh)	Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)	
RES	\$ 0.01569	\$ 0.01159	\$ 0.02728	\$ 0.01972	
PL	0.01569	0.00961	0.02530	0.01785	
LLP	0.01569	0.00821	0.02390	0.01662	
ELP/LPT	0.01569	0.00667	0.02236	0.01597	
SLP	0.01569	0.00637	0.02206	0.01562	
TS	0.01569	0.00566	0.02135	0.01464	
STLT & ANSL	0.01569	0.00075	0.01644	0.01001	

Effective August 2009, the electric fuel adjustment factor includes the STEP surcharge.
Regulatory Adjustment Factors effective February 1, 2020.

Previous		Current	
Date Entered	July 31, 2015	January 5, 2021	
Standard Electric Utility Tariff			
Utility Name	CPS Energy		
Rate Name	Residential		
Rate Effective Date	February 1, 2014		
First Month of Summer	January	June	Select Ja
Last Month of Summer	December	September	Select D
Monthly Charge		8.75	\$/month
Summer			
Size of First Block		600	kWh
Size of Second Block		remainder	kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block		0.0691	\$/kWh
Cost of Second Block		0.0889	\$/kWh
Cost of Third Block			\$/kWh
Cost of Fourth Block			\$/kWh
Winter			
Size of First Block		remainder	kWh
Size of Second Block			kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block		0.0691	\$/kWh
Cost of Second Block			\$/kWh
Cost of Third Block			\$/kWh
Cost of Fourth Block			\$/kWh
Extra Charges		0.02728	\$/kWh
Taxes		2.1637	%

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Utility Allowance: HUD Utility Schedule Model

Trash Tariffs

- This data will be used on the "Tariffs" tab
- Obtain the rates from the trash provider's website
- Include all charges that would be present on the tenant's utility bill

PAYT	SMALL	MEDIUM	LARGE
Solid Waste Fee	\$14.76	\$18.76	\$26.76
Environmental Fee - Solid Waste	\$1.74	\$1.74	\$1.74
Environmental Fee - Parks	\$1.50	\$1.50	\$1.50
Total City Services (Taxable)	\$18.00	\$22.00	\$30.00

OTHER FEES

These fees are collected through the CPS Energy electric bill (City Services).

ITEM	FEE
Blue Cart Contamination Fee	\$25.00
Extra Garbage Collection Fee	\$10.00

<https://www.sanantonio.gov/swmd/About-Us/Rates>

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Utility Allowance: HUD Utility Schedule Model

Trash Collection Fees

- Use the applicable rate for your development, if the tenants can choose their size you can use the most conservative
- Enter the rates in each box, this one will not vary based on unit size

SOLID WASTE SERVICE MONTHLY RATES			
PAYT	SMALL	MEDIUM	LARGE
Solid Waste Fee	\$14.76	\$18.76	\$26.76
Environmental Fee - Solid Waste	\$1.74	\$1.74	\$1.74
Environmental Fee - Parks	\$1.50	\$1.50	\$1.50
Total City Services (Taxable)	\$18.00	\$22.00	\$30.00

Trash Collection Fees

Studio
1 Bedroom
2 Bedroom
3 Bedroom
4 Bedroom
5 Bedroom

	18
	18
	18
	18
	18
	18

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Utility Allowance: HUD Utility Schedule Model

Building Characteristics

Unit Type: Larger Apartment Bldgs. (5+ units)

Schedule Type: Projected Allowance Schedule

Electric Tariff: Standard Electric Utility Tariff

Green Discount*: None

*Choose LEED or ENERGY STAR if the building meets that certification.
Choose Significant Green Retrofit if the building had energy saving rehabilitation to any of the following systems in the last 5 years:
(1) heating, (2) cooling, (3) lighting, (4) DHW systems, (5) appliances, (6) building envelope, (7) water measures, and/or (8) on-site generation.

Print the form shown below for the selected unit type

Projected Family Allowances To be used to compute specific family allowances.

Unit size: 0 BR

Utility or Service	Fuel Source
Space Heating	Electric Resistance
Cooking	Electric
Other Electric	Electric
Air Conditioning	Electric
Water Heating	Electric
Water	Not Applicable
Sewer	Not Applicable
Trash Collection	Tenant pays
Range/Microwave	Not Applicable
Refrigerator	Not Applicable
Other	Not Applicable

Most of the errors are caused by incorrect selections on this section of the tab. This section should match the Utility Allowance Questionnaire and will allow the final tab to populate correctly.

Building Characteristics

- Select the "Building Characteristics" tab
- Unit Type
- Schedule Type and Electric Tariff should not change
- Green Discount; this is only selected if the appropriate back-up documentation can be provided to show that the building meets the requirements
- Utilities and Sources should be selected as is applicable to the development

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Utility Allowance: HUD Utility Schedule Model

Print the form shown below for the selected unit type
Create copies of this worksheet for other unit types

Show/Hide State Average Schedule

Allowances for Tenant-Furnished Utilities and Other Services		U.S. Department of Housing and Urban Development Office of Public and Indian Housing						
Locality	Green Discount	Unit Type				Date (mm/dd/yyyy)		
San Antonio	None	Larger Apartment Bldgs. (5+ units)				1/5/2021		
Utility or Service		Monthly Dollar Allowances						
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Space Heating	Natural Gas							
	Bottled Gas							
	Electric Resistance	\$15.64	\$16.86	\$18.50	\$20.15	\$21.80	\$23.44	
	Electric Heat Pump							
	Fuel Oil							
Cooking	Natural Gas							
	Bottled Gas							
	Electric	\$4.02	\$4.73	\$6.85	\$8.97	\$11.08	\$13.20	
	Other							
Other Electric		\$15.19	\$17.87	\$24.87	\$31.86	\$38.86	\$45.85	
Air Conditioning		\$12.49	\$15.05	\$22.34	\$29.65	\$36.26	\$42.75	
Water Heating	Natural Gas							
	Bottled Gas							
	Electric	\$9.02	\$10.61	\$13.54	\$16.48	\$20.11	\$23.87	
	Fuel Oil							
Water								
Sewer								
Trash Collection		\$18.00	\$18.00	\$18.00	\$18.00	\$18.00	\$18.00	
Range/Microwave								
Refrigerator								
Other - specify								
Total		\$74.37	\$83.12	\$104.11	\$125.11	\$146.11	\$167.11	
Total Allowance (Rounded Up)		\$75.00	\$84.00	\$105.00	\$126.00	\$147.00	\$168.00	

The schedule above has allocated any monthly fees from tariffs into the 1st instance they are selected in the Building Characteristics sheet.
Note: If no utility has been selected monthly allowances can be found in space heating. (For an electric heat source, it is in Electric Resistance.)
Be sure to apply monthly fees correctly to allowances with a different utility profile!

HUD-52667 Form

- You can clear the data that does not apply
 - Space heating is Resistance so we do not need the other numbers in that section
- Make sure you do not delete an applicable line
 - If you remove Air Conditioning you will not have a correct UA
- The bottom number in the yellow line is the applicable UA for the unit size

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Utility Allowance: Building Types

Identifying Buildings Types

HUD Document referenced in §10.614(b)(1): https://www.hud.gov/sites/documents/DOC_11608.PDF

Additional Resource from HUD: <https://www.huduser.gov/portal/sites/default/files/pdf/HUSM-Instructions.pdf>

Department of Housing and Urban Development
Office of Public and Indian Housing (PIH)



Public and Indian Housing Information Center (PIC-IMS)
Job Aid for Configuring Buildings and Units

December 19, 2007

CURRENT MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The listing of previous HUSM unit types is shown on the table below to provide a way to update utility schedules based on RECS unit type and number. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3.

PREVIOUS MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4

Bedrooms - Users select the appropriate number of bedrooms from the drop-down menu. The model allows for studio and 1 to 5 bedroom unit selections.

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Utility Allowance: Building Types

CURRENT MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The listing of previous HUSM unit types is shown on the table below to provide a way to update utility schedules based on RECS unit type and number. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3.

PREVIOUS MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4

Currently, the Department utilizes the HUD Guidance as shown on this slide to determine the appropriate building type for developments. This is used when calculating the HUD Model for a development.

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Utility Allowance: Building Types

****If the multi-story building (units on top of other units) has less than five (5) units, the Department will calculate based on Low-rise (2-4 units). If the multi-story building (units on top of other units) has five (5) or more units, the Department will calculate based on Apartments (5+ units).****

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Utility Allowance: MFDL Buildings

Developments with Multi-Family Direct Loan (MFDL) funds issued by the Department

- May use any methodology except PHA
- May not combine methodologies
- Must use the Department issued/approved UA for all units, even voucher holders
- HTC buildings in which there are units under MFDL programs are considered HUD-Regulated buildings and the MFDL Utility Allowance will be the allowance for all units in the building, regardless of the resident being on the MFDL program

Developments with Multi-Family Direct Loan (MFDL) funds NOT issued by the Department

- Must use the issued/approved UA for all units, even voucher holders
- HTC buildings in which there are units under MFDL programs are considered HUD-Regulated buildings and the MFDL Utility Allowance will be the allowance for all units in the building, regardless of the resident being on the MFDL program

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Utility Allowance: MFDL Buildings

The Department will issue a Utility Allowance if annual review is not received by October 1st

- For property specific data, the Department will use:
 - The Annual Owner's Compliance Report;
 - Entrance Interview Questionnaire from prior monitoring review;
 - The owner may be contacted for any missing or unclear information
- Utilities will be evaluated in the following manner:
 - For regulated utilities, the Department will contact the provider directly and apply the charges in effect no later than 60 days before the allowance will be effective.
 - For deregulated utilities:
 - The Department will use the Power to Choose website and search available providers by zip code
 - The plan chosen will be the median cost per kWh based on the average price per kWh for the average monthly use of 1000 kWh
- The Department will notify the owner contact in CMTS of the new allowance
 - The owner will be provided a five day period to report errors related to the physical characteristics of the buildings and utilities paid by the residents
- The allowance must be implemented for rent due in all program units thirty (30) days after the Department notifies the Owner of the allowance.

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Utility Allowance: After the Compliance Period

- After the Compliance Period, utilities paid to the Owner are accounted for in the utility allowance
 - TCAP, Exchange, Bond, and SHTF Developments layered with Housing Tax Credits no longer within the Compliance Period also include utilities paid to the Owner as part of the utility allowance
- The tenant paid portion of the rent plus the applicable utility allowance must not exceed the applicable rent limit
- It is the owner's responsibility to ensure that all rents are properly restricted

What does this mean? If the development bills water/sewer, for example, based on a RUBS system; during the Compliance Period this is a non-optional fee and must be taken into account on the monthly rent; however, once the Compliance Period is over this now becomes part of the Utility Allowance and is no longer considered a non-optional fee. Failure to do this will result in noncompliance!

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Utility Allowance: Changes in the UA

An Owner may not change methodologies or the utilities that a resident is financially responsible for without prior written Department approval.

- The Department will review all requests, with the exception of the “Actual Use” methodology, within 90 days of the receipt of the request
- If the owner fails to post the notice to the residents AND simultaneously submit the request to the Department by the beginning of the 90-day period, the approval or denial will be delayed for up to 90 days after the Department notification

*** Once approval to start or stop charging for a utility is received, owners must implement the change in utilities charged at the time of each household’s lease renewal, and no sooner. ***

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Utility Allowance: Annual Review

Requirements for Annual Review

- RHS and HUD-Issued Utility Allowances
 - The owner must demonstrate that the utility allowance has been reviewed annually and in accordance with RHS and HUD regulations
- PHA Method
 - Owners are responsible for periodically determining if the applicable PHA released an updated schedule to ensure timely implementation. When a new allowance is made available by the PHA, it can be implemented immediately, but must be implemented for rent due 90 days after the update was released
- Written Local Estimate (WLE), HUD Utility Model Schedule (HUSM) and Energy Consumption Model (ECM)
 - Owners must update the allowance once a calendar year. The update and all back-up documentation MUST be submitted to the Department no later than October 1st of each year
- Actual Use Method
 - Owners must update once a calendar year. The update and all back-up documentation MUST be submitted no later than August 1st of each year

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Utility Allowance: Combining Methods

- **In general, owners may combine any methodology described in §10.614 for each utility service type paid directly by the resident and not by or through the owner of the building**
 - Example: If residents are responsible for electricity and gas, an owner may use the appropriate PHA allowance to determine the gas portion of the allowance and use the HUD Model to determine the electric portion of the allowance
- **RHS and HUD-Regulated buildings (including those HUD-Regulated by MFDL funds) are not allowed to combine methodologies**

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Utility Allowance: Combining Methods

Utility Allowance to use when there are multiple HUD programs in a building:

- If the building is covered by Multifamily Notice H-2015-4 (PBS8) or receives assistance from RHS, the applicable UA for every rent restricted unit is the UA issued by that program.
- If the building has Department MFDL funds, the applicable UA for every rent restricted unit is the UA approved by the Department (per 10 TAC). This is true even if the building also has Project Based Vouchers/Public Housing.
- If the building has multiple HUD programs that are not covered by 2015-4 (Public Housing/Project Based Vouchers) AND the building does not have Department MFDL funds, it is up to the owner to say which UA they are using.
- Tenants with Housing Choice Vouchers in a HUD-regulated building will not use the PHA UA. They will always use the UA approved by the HUD program.

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Utility Allowance: Applications

- If the application includes RHS assisted buildings or tenants, the UA is prescribed by the RHS program, no other method is allowed
- If the application includes HUD-Regulated buildings for HUD programs, other than an MFDL program, the applicable UA for all rent restricted units in the building(s) is the HUD Utility Allowance, no other method is allowed
- If the application includes MFDL funds from the Department, applicants may calculate the UA in accordance with 10 TAC §10.614(c)(3)(B), (C), (D) or (E)
- If the application includes federal funds from a unit of local government but no MFDL from the Department, applicants are required to request in writing the UA from the awarding jurisdiction
- For all other applications, applicants may calculate the UA in accordance with §10.614(c)(3)(A), (B), (C), (D) or (E)
 - Upon request, the Compliance Division (UA Team) will calculate or review an allowance within 21 days, but no earlier than 90 days from when the application is due

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Utility Allowance: Applications

All Utility Allowance requests related to applications of funding must:

- Be submitted directly to UA-Application@tdhca.state.tx.us
- Requests not submitted to this email address will not be recognized
- Include the "Utility Allowance Questionnaire for Applications" along with all required back-up based on the methodology

If owners want to change to a UA other than what was used for underwriting the owner MUST submit documentation for Department approval, at minimum, 90 days prior to the commencement of leasing activities.

The Owner is not required to review the utility allowances, or implement new allowances, until the building has achieved 90% occupancy for a period of 90 consecutive days, or the end of the first year of the Credit Period (if applicable), whichever is earlier.

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Utility Allowance: Submission

All requests described in this presentation, other than those for applications, must be complete and uploaded directly to the Development's CMTS account using the "Utility Allowance Documents" in the type field and "Utility Allowance" as the TDHCA Contact. The Department will not be able to approve requests that are incomplete and/or are not submitted correctly.

Utility Allowance Submissions for the 811 Program must be uploaded to the attention of Bill Cranor. This means, you will have to upload one packet to the attention of Utility Allowance and another to Bill Cranor.

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Utility Allowance: Section 811 PRA Program

For Owners participating in the Department's Section 811 Project Rental Assistance (PRA) Program the owner may choose the methodology they wish to use. The rules for the chosen method must be followed. On an annual basis, the Development will submit a Utility Allowance update to the 811 Division. The 811 Division will issue an approved Rent Schedule once the submission is reviewed. The allowance listed on the rent schedule only applies to 811 PRA units, not the entire building, and is the only allowance approved for use on 811 PRA units.

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Utility Allowance: Keys to Success

- ALWAYS upload Utility Allowance submission to the attention of “Utility Allowance” on the TDHCA Contact List
- Review the UA submission prior to upload
 - Is the questionnaire accurate and complete?
 - Does the posting have the right dates and amounts and unit sizes?
- Upload all required items for the methodology chosen
- Make sure you are using the most current forms available on the Department website:
<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>
- Email a member of the UA Team **prior** to submission if you have a question
- Remember, Utility Allowance Rules are **Building** Rules

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Utility Allowance



The Utility Allowance Team

Cara Pollei, cara.pollei@tdhca.state.tx.us
 Carolyn Metzger, carolyn.metzger@tdhca.state.tx.us
 Nicole Martinez, nicole.martinez@tdhca.state.tx.us

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THANK YOU

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

DON'T FORGET:

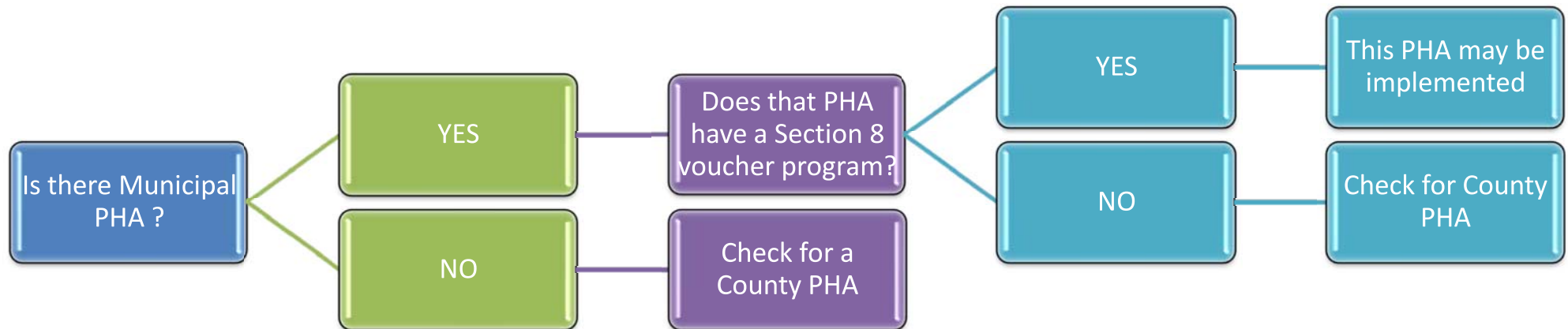
UTILITY ALLOWANCE ANNUAL REVIEW IS REQUIRED BY
OCTOBER 1, 2021!



Steps for Identifying the Applicable Public Housing Authority

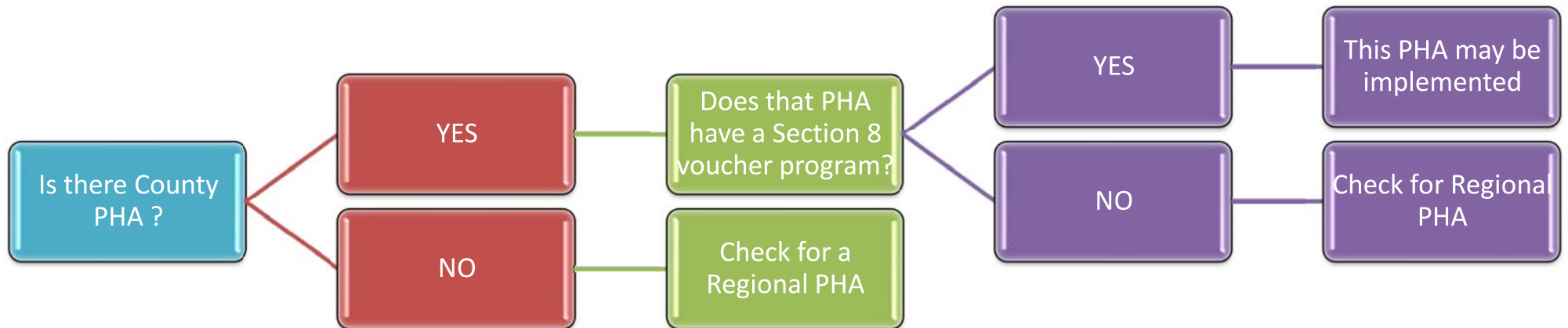
Note: This method cannot be used to establish the utility allowance for the Multifamily Direct Loan (“MFDL”) program

Step 1: To find the applicable Public Housing Authority (“PHA”) for your property, you first must determine if there is a Municipal PHA for the city in which your property is located. You can search all Housing Authorities in Texas on the [Texas Housing Association](#) website. To determine if a PHA has a Section 8 voucher program, check HUD’s [PHA Contact Information for Texas](#). Follow these flow charts to help guide you through the process.



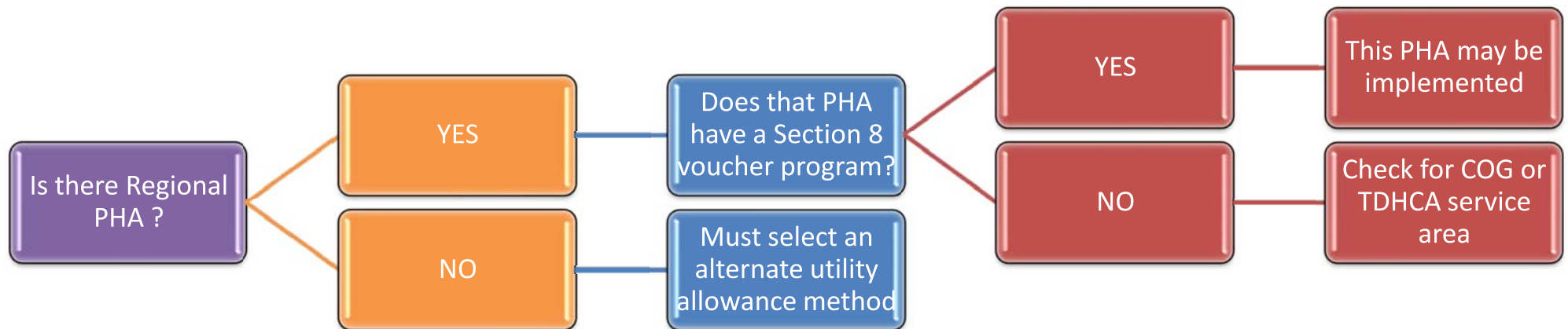
Steps for Identifying the Applicable Public Housing Authority

Step 2: If you are unable to identify an applicable Municipal PHA, proceed to determining if there is a County PHA:



Steps for Identifying the Applicable Public Housing Authority

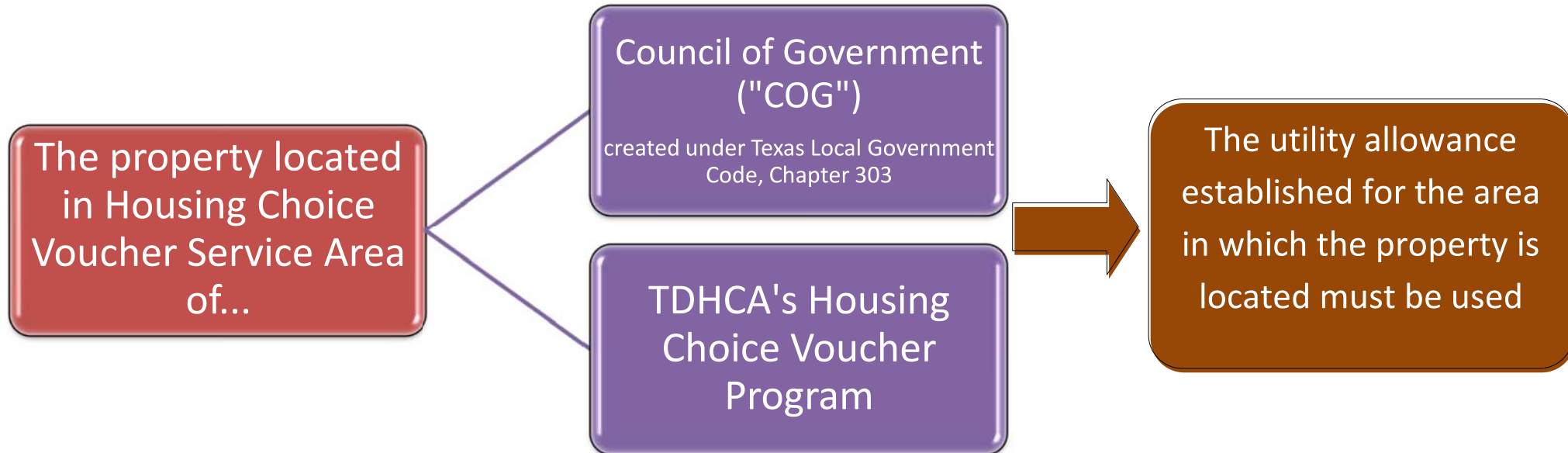
Step 3: If you are unable to identify an applicable Municipal PHA or County PHA, proceed to determining if there is a Regional PHA:



Note: you must maintain documentation that the PHA is a Regional PHA under [Texas Local Government Code, Chapter 392](#). This is a specific type of organization for a Housing Authority and not just that the PHA will send section 8 vouchers to your property.

Steps for Identifying the Applicable Public Housing Authority

Step 4: If you are unable to identify a Regional PHA, you may be eligible to still use this method if...



HUD Utility Schedule Model (HUSM) Instructions

I. Introduction

The HUD Utility Schedule Model (HUSM) has been developed to provide a consistent basis for determining utility schedules, using form HUD-52667, throughout the United States.

This model is a web application that is primarily based on the Residential Energy Consumption Survey (RECS), a nationally representative survey that collects data on energy characteristics of housing units, usage patterns, and household demographics.¹ Using correlation and regression techniques, the HUSM calculates an allowance for each end-use, with consideration for unit type, size of the unit, and the type of utility used. In addition, the HUSM also considers local 30-year normalized weather data, to estimate average consumption in a geographical area.

In order for a schedule to be produced, users must specify the unit type, size of the unit, the type of utility used, the location, and the utility rate schedule for each type of utility.

Using the Internet, users can access the model from the following URL:

<http://www.huduser.gov/portal/resources/utilallowance.html>

At this URL, users may also access a Microsoft Excel-based version of the model.

II. Using the HUSM

The HUSM is divided into multiple sections for data input. Each section is separated by a blue border and titles are located in the upper-left portion of each respective section, in a blue font. The instructions provided in this document relate specifically to the web-based version of the HUSM. Users of the Excel-based model may also follow these instructions but must be cognizant that there are slight variations amongst the different versions of the model.

The sections of the model are listed below:

- Location
- Unit Information
- Actual Allowance
- Standard Electric Utility Tariff
- Standard Natural Gas Utility Tariff
- Fuel Oil Delivery Contract
- Liquefied Petroleum Gas (LPG) Delivery Contract
- Water Supply Tariff
- Sewer Tariff

¹ <http://www.eia.gov/consumption/residential/about.cfm>

- Trash Collection Fees
- Range/Microwave Fees
- Refrigerator Fees
- Other Fees

The “Preview Allowance Schedule” and “Projected Family Allowances” buttons at the top of the model allow users to produce a sample utility schedule and sample HUD-52667 form, respectively, when all user input entries are made.

Bracketed in the picture below is the **Location** section, the first section of the model.

In this section, users click on the white cell beside “Search for PHA or ZIP.” Users simply input the first three characters of their PHA code or zip code and a drop-down menu appears, allowing users to scroll through options until they find their PHA or zip code. Once selected, the user’s choice emerges in the ensuing cell, “Selected PHA or ZIP.” The “Form Date” also requires manual entry. Here, users click on the appropriate cell and a drop-down calendar will appear. Users toggle between months using the arrows in the upper corners of the calendar and then select the appropriate date from the calendar itself. Similarly, each section must be completed to implement the model.

The **Location section**, shown above, enables the model to reference local weather information, critical for any estimate of heating and cooling.

The **Unit Information** and the subsequent **Actual Allowance sections** enable the model to calculate utility allowances for specific residents. These sections include detailed information, such as unit type and relevant end-use, which are necessary to produce allowance estimates.

The remaining HUSM sections pertain to tariffs and fees levied by utility companies. These sections allow the model to consider non-consumption-related expenditures that are considered within the utility allowance such as energy taxes, utility consumption rates, and trash collection, among others.

Each user must complete the entries in each section of the HUSM. When all the consumption entries are made, the HUD-52667 form page is populated with utility allowance results. Those results can then be previewed or printed right from the website when the “Preview Form 52667” button is selected.

III. Inputting data into the HUSM

The Location Section

The first section of the HUSM is the *Location* section. As the HUSM predicts allowances for utility consumption nationally, the model must account for the vast regional differences therein. For example, heating/cooling estimates are dramatically different between the arid desert of Arizona and the coast of Maine. Entering the location allows the model to account for these regional differences.

Search for PHA or ZIP – Here, users are able to search for their PHA or zip code by typing in the name of the city, PHA, or zip code. A window will appear to help narrow down the search results. Selecting the appropriate PHA or zip code populates the “Climate Data” section of the page with the applicable weather data.

Form Date – Enter the date you wish to appear on the completed form. This date is often the date on which the form goes into effect, or the date on which the form was last changed. This entry is likely to change every time the form is updated.

Include Allowance for Air Conditioning – Check the box if the housing authority normally includes an allowance for the electricity consumption associated with providing air conditioning. Depending on the location and the climate, this is normally checked.

Climate Data – This button is not an input into the model. However, when selected, it will provide the 30-year average weather data used by the model to calculate the allowance.

The Unit Information Section

The *Unit Information* section is the first of two sections that allow the user to add resident-specific information.

Unit Type – Users choose the appropriate structure from the drop-down menu. The model allows for the following selections; single-family house, single-family attached house, low-rise apartment buildings with 2-4 units, larger apartment buildings with 5+ units, and manufactured homes. The following table shows the Residential Energy Consumption Survey (RECS) unit type and type number.

CURRENT MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The listing of previous HUSM unit types is shown on the table below to provide a way to update utility schedules based on RECS unit type and number. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3.

PREVIOUS MODEL UNIT TYPES

Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4

Bedrooms – Users select the appropriate number of bedrooms from the drop-down menu. The model allows for studio and 1 to 5 bedroom unit selections.

Energy Savings Design –The model provides for buildings that have undergone energy savings improvements with a series of radio buttons: Energy Star Certification, LEED Certification, and Significant Green Retrofit. The model is normally set to None, indicating that the building does not meet an energy saving standard. Users choose Energy Star Certification, which represents 18% in energy savings, if the residence being estimated meets the Environmental Protection Agency (EPA) standard as an Energy Star property. Users can also select LEED Certification, a 25% energy reduction, if the property meets the LEED standards according to the U.S. Green Building Council (USGBC). Finally, the user may choose Significant Green Retrofit, signifying an 18% impact on energy efficiency, if the building has had an energy saving rehabilitation to any of the following systems in the last five years: Heating; Cooling; Lighting; DHW system; Appliances; Building envelope; Water measures; or On-site generation.

Electric Tariff – Some utilities have special discounted tariffs for customers that use electric heat or use only electricity and no other source of energy in their homes. If that is the case, users should check this box.

The Actual Allowance Section

The *Actual Allowance* section specifies the resident's utility responsibility. If the tenant does not pay a particular utility or is not responsible for the utility's remittance, the PHA does not cover the utility in an allowance. For example, trash collection is often covered by the municipality. In this instance, the resident does not pay a utility bill on trash collection and so the PHA does not provide an allowance for trash.

This section contains 11 different drop-down menus. Each menu represents the different available allowances. Users select the option specific to the resident. For example, the Space Heating menu allows users to select from the following options; *Not applicable*, *Natural Gas*, *Bottled Gas*, *Electric Resistance*, *Electric Heat Pump*, and *Fuel Oil*. The user first should determine if the tenant is financially responsible for remittance, and if so, select the fuel source used for heat.

For allowances like *Trash Collection* and *Other*, which are often excluded by PHAs, the only options are *Not applicable* and *Tenant pays*. Selecting *Tenant Pays* includes the allowance in the utility estimate. Conversely, *Not applicable* means that any tariff/fee entered on the Tariff page will not be included in the final utility allowance.

The Tariffs Section

A significant part of the model is used to update the rates paid for utilities. The entries in this section allow users to update the tariffs for electricity, natural gas, fuel oil, liquefied petroleum gas (LPG), water, sewer, trash, and certain appliance fees. All energy and non-energy related costs can be included in the model.

To input tariff and fee information, a user must have access to the appropriate utility rates. Most utilities allow you to download a tariff schedule or rate book from their website. After you do this, make sure to understand the utility bill. At times, the tariff is broken into a main tariff and many riders. Some utilities describe taxes in the rate book and some do not. There are two different types of tariffs, *stepped rates* and *fee-for-service*.

Stepped rates are common practice among utilities, and they are designed to reflect the effect of demand on utility prices. For example, additional electrical consumption during the summer months requires a higher rate per kWh. To accomplish this, a utility company often creates two different rates, one for summer and one for winter. However, within each season, consumers have different energy demands. To account for this, a utility would first set up a summer block “size.” Let us say that 600 kWh is an example block “size.” This means that a user could expect one rate for their first 600 kWh, and then another if they surpass that amount of consumption. Then the utility company selects a “cost.” This cost can be explained as a dollar per kWh rate for each of the blocks. Continuing with the example, an energy company could charge \$0.11 (“cost”) for a consumer’s first 600 kWh (“size”) of energy consumption and then charge \$0.18 for each kWh above 600 kWh.

The HUSM allows for four block “sizes” and “costs” of electric, natural gas, LPG, fuel oil, water, and sewer rates. In addition, HUSM provides for two possible seasons, summer and winter. Block sizes and rates can sometimes be found on a utility bill, but other times they are hard to determine. Utility companies are required to publish their stepped rates, and these are regularly found online.

Using the standard electric tariff as an example, the following directions can be used to implement any of the stepped rate tariffs:

Utility Name and ***Rate Name*** – Users enter the name (or an abbreviation of the name) for the utility that provides electricity for the specific rate to be used in the calculations. Many utilities have multiple rates that could be used by residential customers; users choose one that is the most typical.

Rate Effective Date – Often utilities will use the same name for a tariff even though they may change the values. Entering an effective date here allows the user to understand which version of the tariff you are using.

First Month of Summer and ***Last Month of Summer*** – From the drop-down menu, select the months that are the first and last months of the summer period as described on the electric bill or in the rate book. If the tariff does not vary by season, users set the summer period to begin January and end December. If the tariff is seasonal but starts mid-month, users should make sure the number of summer months entered in the cell is equal to the total number of summer months used by the utility, as the number of total months is more important than exactly recording the beginning of a tariff change.

Monthly Charge – Enter the value charged for electric service. This is sometimes called a monthly charge or a service charge. This should be readily available on any utility bill.

Floor and Ceiling – Often utilities charge a maximum monthly fee, are required to charge a minimum, or both. For this reason, many of the HUSM sections provide for “floor” (i.e., minimum) and “ceiling” (i.e., maximum) monthly values. In these cases, the floor checkbox should be selected when a minimum exists and ceiling should be selected for maximum. Adjacent to these checkboxes are fields where users should input the floor or ceiling value.

Block Tariffs – Block tariffs are often expressed as a “stepped” or a “blocked” tariff or rate. For example, electricity costs might be 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If the rate is not a stepped/blocked rate, enter values for the first block only.

Summer/Winter Size of 1st-4th Blocks – The size of the block refers to the number of units of utility usage that a rate applies to. For example, if a tariff is 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh, there are two blocks. The size of the first block is “500,” and the size of the second block is effectively infinite. HUSM recognizes the second size by automatically filling in the next block with the word “remainder.”

Size of First Block	remainder	500	kWh
Size of Second Block		remainder	kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block	n/a	.05	\$/kWh
Cost of Second Block		.04	\$/kWh
Cost of Third Block		n/a	\$/kWh
Cost of Fourth Block			\$/kWh

Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the tariff does not have blocks that vary by season, users only enter values for the summer entries.

Summer/Winter Cost of 1st-4th Blocks – Continuing the example above, the user would enter 0.05 in the “Cost of First Block” a 0.04 in the “Cost of the Second Block.” If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If multiple companies are involved in providing the utility service, such as when the utilities are deregulated, then add up the costs for each company for that block and enter the combined total. Note: HUSM will alert users when there is a missing cost.

Extra Charges – This is an extra fee charged by the utility for every kWh sold. That fee and possible credits are often expressed as a fuel cost adjustment, an energy cost adjustment, or a surcharge. Credits are often provided on the basis of every kWh and can be entered as negative numbers. If multiple extra charges exist in the tariff, add them together.

Taxes – This is expressed as a whole number percentage. For a 3.0 percent tax (3.0%), simply enter “3.0.” The tax is calculated from a subtotal that includes the block charges, the monthly charge, and the extra charges.

Standard Electric Utility Tariff

	Previous	Current	
Utility Name			
Rate Name			
Effective Date	MM/DD/YYYY	MM/DD/YYYY	
First Month of Summer	January ▼	January ▼	Select January if rate is not seasonal
Last Month of Summer	December ▼	December ▼	Select December if rate is not seasonal
Monthly Charge			\$/month
Floor	<input type="checkbox"/>		
Ceiling	<input type="checkbox"/>		
Summer			
Size of First Block	remainder	500	kWh
Size of Second Block		remainder	kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block	n/a	.05	\$/kWh
Cost of Second Block		.04	\$/kWh
Cost of Third Block		n/a	\$/kWh
Cost of Fourth Block			\$/kWh
Winter			
Size of First Block	remainder	remainder	kWh
Size of Second Block			kWh
Size of Third Block			kWh
Size of Fourth Block			kWh
Cost of First Block	n/a	n/a	\$/kWh
Cost of Second Block			\$/kWh
Cost of Third Block			\$/kWh
Cost of Fourth Block			\$/kWh
Extra Charges			\$/kWh
Taxes		3	%

In some locations, utilities are deregulated and multiple companies may be involved in providing service. This is especially likely for natural gas and electric utilities. To determine usage for deregulated utilities, add up the charges for each kWh or other unit of measure and enter the combined total. For example, if an electric generating company charges 4 cents per kWh and the electric distribution company charges 3 cents per kWh, add the two charges together to get 7 cents per kWh. (If the companies have multiple block rates, these charges need to be combined for each rate block.)

The remaining sections of the model relate to fee-for-service utilities, including trash collection, microwave, refrigerator, and other. If rental units in the PHA's jurisdiction are typically leased without owner-provided ranges and/or refrigerators, an allowance must be made for the cost to the family in providing its own. Allowances for tenant-provided ranges and refrigerators should be based on the lower of the cost of leasing the equipment or the cost of purchasing it on an installment plan. The utility allowance schedule should also provide allowances for all other utilities and services for which, in the PHA's locality, the tenant is typically responsible, and which are required for compliance with HQS. Examples would be firewood used as a primary heating fuel, or the required annual flushing of a septic tank in an area without public sewers. The model provides for these inputs:

Trash Collection Fees – Enter the average monthly fees for trash collection according to a unit's number of bedrooms. In general, fee-for-service rates can change based on the amount of bedrooms on the property. For example, it is expected that an apartment with more bedrooms has more occupants and therefore, more trash and collection costs.

Range/Microwave Fees – Enter the average monthly cost for renting or financing the purchase of a range and microwave oven for units of different sizes.

Refrigerator Fees – Enter the average monthly cost for renting or financing the purchase of a refrigerator for units of different sizes.

Other Fees – Enter the average monthly fees for units of different sizes.

Trash Collection Fees		
	Previous	Current
Studio		10
1 Bedroom		12
2 Bedroom		14
3 Bedroom		16
4 Bedroom		20
5 Bedroom		25

Once all of the inputs are entered, a user can produce a sample HUD-52667 by pressing the "Projected Family Allowances" button at the top of the webpage. Notice that there is a second button at the top of the page labeled "Preview Allowance Schedule." This option allows users to view and print a schedule of allowances, without the additional family-specific allowance required on the HUD 52667.

PHAs can also evaluate the reasonableness of the utility allowance by comparing their respective HUSM estimate with a schedule estimated using state average utility rates and climate data. This is done by clicking the “Show/Hide State Average”² button.

Lastly, PHAs can also make a factor adjustment to the estimate using the “Apply Adjustment” button. Factor adjustments are helpful when a schedule of allowances is consistently low or high relative to actual allowances. As with taxes in the tariff section, users input the percent increase/decrease to be applied across all of the allowances. The following image depicts a 2 percent (2.0%) increase:

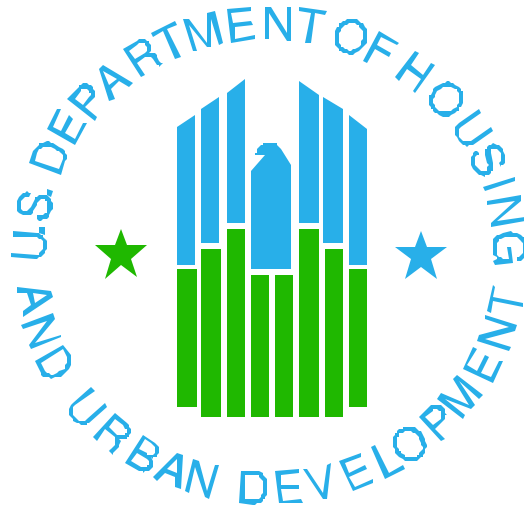
Adjustment % (negative to decrease):

Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

² State Averages are compiled using 2014 eia.gov state average natural gas and electric utility rates. Water and Sewer rates are derived from the American Water Works Association 2014 Water and Wastewater Rate Survey. Finally, HUSM uses the average of each state’s 30-year National Oceanic and Atmospheric Administration normalized weather data. Note, some locations are not well represented by the state average.

Department of Housing and Urban Development
Office of Public and Indian Housing (PIH)



Public and Indian Housing Information Center (PIC-IMS)
Job Aid for Configuring Buildings and Units

December 19, 2007

PHA users have raised questions concerning how to configure their buildings in PIC-IMS Development submodule. An improper configuration can make it impossible to enter addresses correctly. In addition, having the wrong configuration can affect Capital Funding.

When the questions below refer to an “entrance”, it means the primary or public entrance (ignore side and back doors not intended for public use).

The key to choosing which type of building you have in PIC is to answer the following questions and look at the specified example:

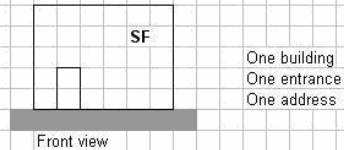
1. Does the building have more than one unit?
 - a. Yes: Go to question 2.
 - b. No: Go to Example A” (Single Family).
2. Does the physical address use an apartment or unit number?
 - a. Yes: Go to question 3.
 - b. No: Go to question 5.
3. Does the building have one primary front entrance to the units?
 - a. Yes: Go to question 4.
 - b. No: Go to question 6.
4. Does the building use an elevator for tenants?
 - a. Yes: Go to Example “E” (Elevator Structure).
 - b. No: Go to Example “D” (Multi-family/Walkup).
5. Does the building have more than two units?
 - a. Yes: Go to Example “C” (Row/Townhouse).
 - b. No: Go to Example “B” (Semi-Detached).
6. Does the building have more than two units?
 - a. Yes: Go to Example “G” (Row/Townhouse with apartment numbers).
 - b. No: Go to Example “F” (Semi-Detached with apartment numbers).

Example A – Single Family

Single Family/Detached (SF)

A structure that consists of a single living unit and is surrounded by permanent open spaces.

One configuration



Example A (SF - Single Family Home) (SD – Semi-Detached with “apartment” numbers) Example G (RW – Row or Townhouse with “apartment” numbers)

# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of an address
1	1	1	No	202 Fido St

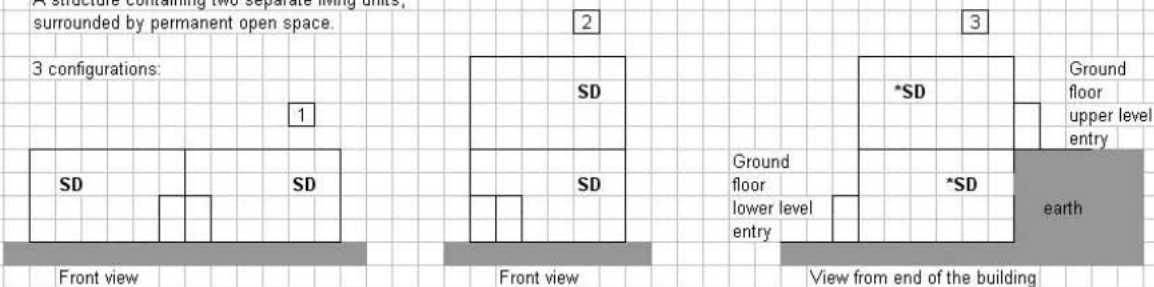
A single family structure will have one building with one entrance in the building details screen and one unit in the unit details screen. Leave the door number blank in the unit details screen (it will not be included in RASS report addresses).

Example B – Semi-Detached

Semi-Detached (SD) (duplex)

A structure containing two separate living units, surrounded by permanent open space.

3 configurations:



* If more than two units this is a Row/Townhouse Dwelling (RW) or a Walk-Up/Multifamily Apartment (WU)

# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of 2 addresses
1	2	1	No	202 Fido St 204 Fido St

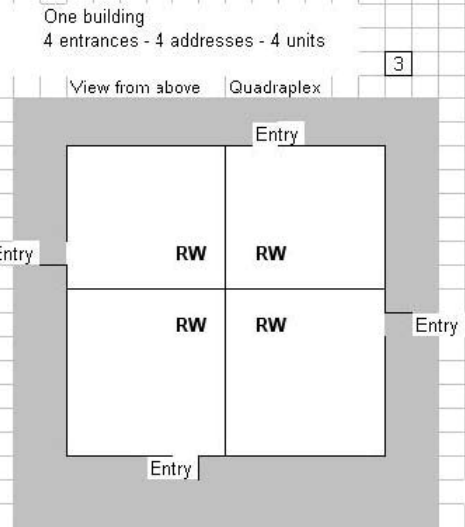
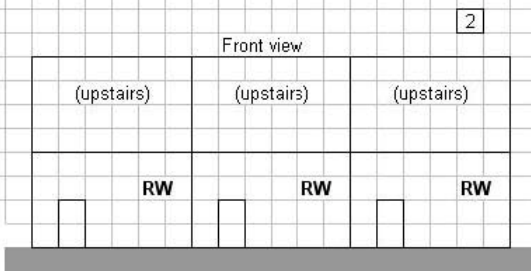
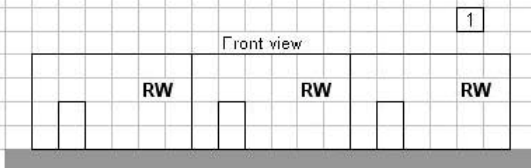
A semi-detached structure will have one building with two entrances in the building table and one unit in the unit details screen for each entrance. Each entrance will have its own address. Leave the door number blank in the unit details screen (it will not be included in addresses for RASS reports).

Example C – Row/Townhouse

Row/Townhouse Dwelling (RW)

A structure containing three or more separate living units, each having individual outside entrances at ground level (which may face in different directions). Each unit may have more than one level.

3 configurations



# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of 3 addresses
1	More than 2	1	No	202 Fido St 204 Fido St 206 Fido St

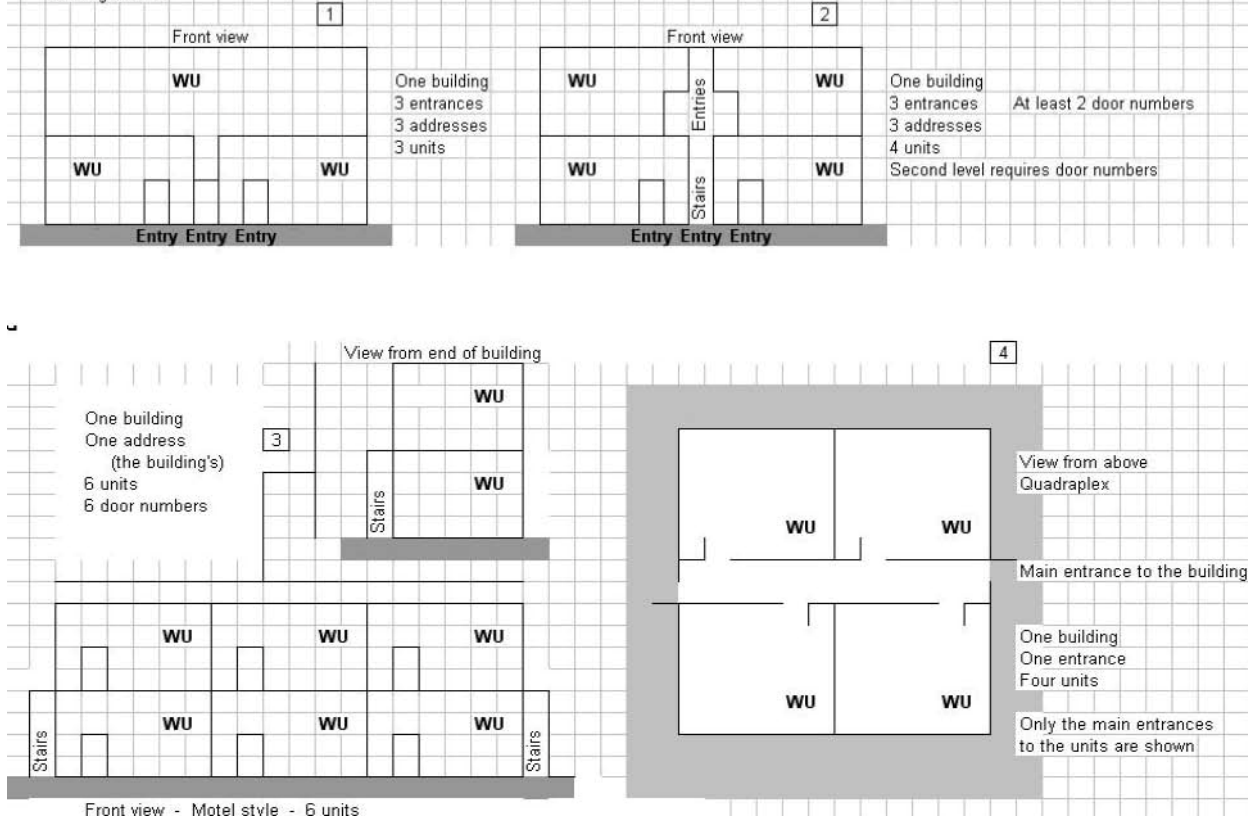
A row or townhouse structure will have one building with more than two entrances in the building details screen and one unit in the unit details screen for each entrance. Each entrance will have its own address. Leave the door number blank in the unit details screen (it will not be included in addresses in RASS reports).

Example D – Walkup/Multi-family

Walk-UP/ Multifamily Apartment (WU)

More than one dwelling on more than one level with one or more entrances at ground level.
But not a SD - Semi-Detached !

4 configurations



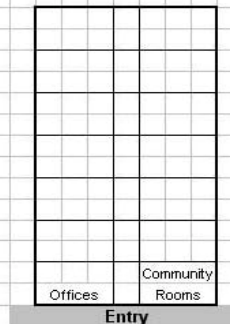
# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of unit addresses in a 6-unit Walkup
1	1	More than 1	Yes	202 Fido St A 202 Fido St B 202 Fido St C 202 Fido St D 202 Fido St E 202 Fido St F
A multifamily or walkup structure will have one building with one or more outside entrances and at least one entrance has <u>more than one unit per entrance</u> in the building table. Each entrance will have the same number of units listed in the unit table for that entrance. The entrance will have the street number, street, city, state and zip code portion of the address. Put the apartment number in the "door number" field in the unit details screen; it will be added to the end of the physical street address from the building table in the RASS reports.				

Example E – Elevator Structure

Elevator Structure (ES)

Any high-rise structure for which an elevator is required under the Minimum Property Standards or local building codes.

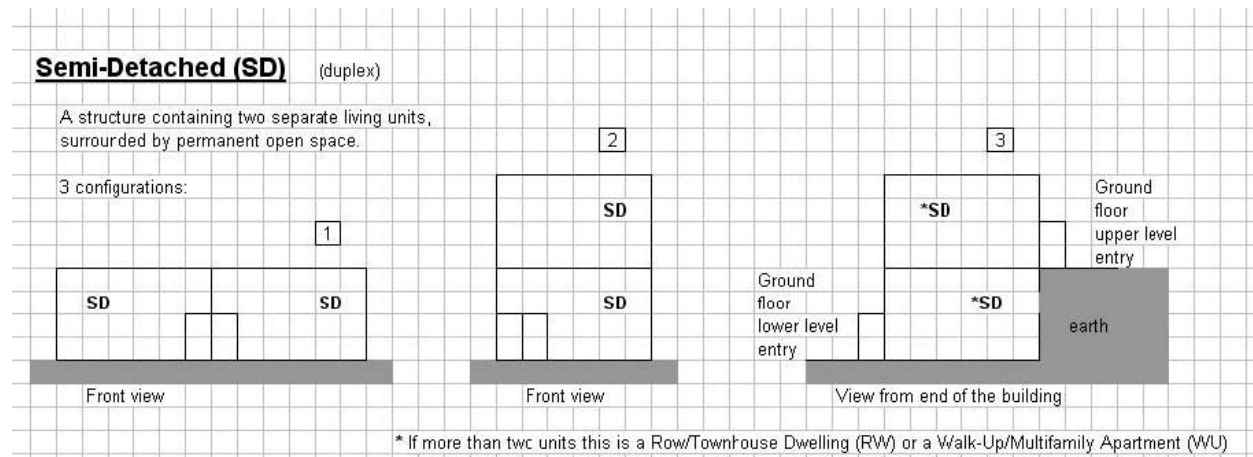
One configuration



One building
One entrance (the main entrance)
One address
7 floors
12 units
more than 12 door numbers

# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of unit addresses in a 6-story elevator structure
1	1	More than 1	Yes	202 Fido St 1A 202 Fido St 1B 202 Fido St 2A 202 Fido St 2B 202 Fido St 3A 202 Fido St 3B 202 Fido St 4A 202 Fido St 4B 202 Fido St 5A 202 Fido St 5B 202 Fido St 6A 202 Fido St 6B
An elevator structure (essentially a multifamily or walkup structure with an elevator) will have one building with one outside entrance and more than one unit per entrance in the building table. It will have the same number of units listed in the unit table for that entrance. Put the apartment number in the “door number” field in the unit details screen; it will be added to the end of the physical street address from the building table in RASS reports.				

Example F – Semi-detached with Apartment Numbers in the Address



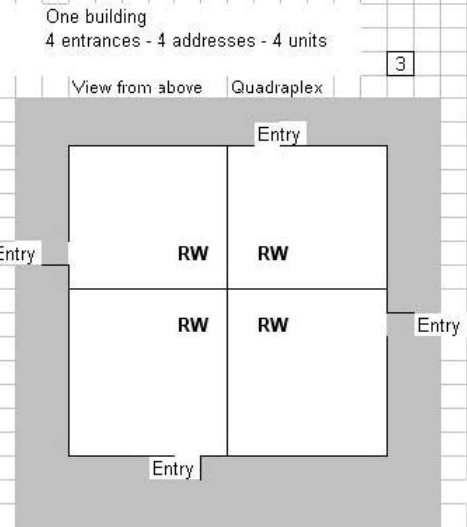
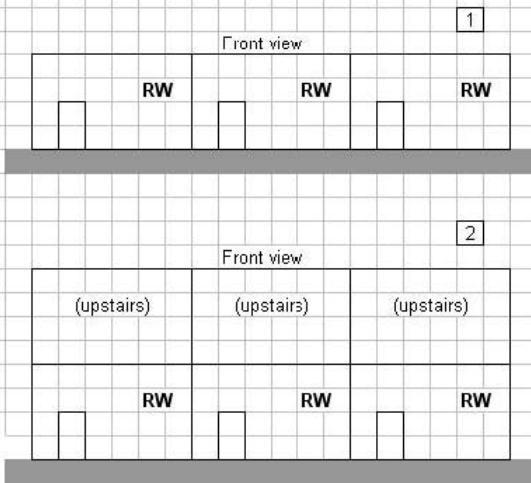
# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Examples of addresses
1	2	1	No	202 Fir St A 202 Fir St B
A semi-detached structure will have one building with two entrances in the building table and one unit in the unit table for each entrance. Leave the door number blank in the unit details screen (it will be ignored in RASS addresses). (If each unit use an apartment number, put it in address line for the entrance in the building details screen.)				

Example G – Row/Townhouse with Apartment Numbers in the Address

Row/Townhouse Dwelling (RW)

A structure containing three or more separate living units, each having individual outside entrances at ground level (which may face in different directions). Each unit may have more than one level.

3 configurations



# of bldgs	# entrances	Units per entrance	Use door no in unit table?	Example of an address
1	2 or more	1	No	202 Fir St #11 202 Fir St #12 202 Fir St #13
A row or townhouse structure will have one building with two or more entrances in the building table and one unit in the unit table <u>for each entrance</u> . Leave the door number blank in the unit details screen (it will be ignored in RASS addresses). (If each unit use an apartment number, put it in address line for the entrance in the building details screen.)				

Which Current Unit Type Applies?

To clear up any confusion about which unit type to apply to the current HUD Utility Schedule Model (HUSM) we are providing these two tables. The current HUSM only allows for the selection of five unit types. The table below shows how these unit types are related to the unit types and type numbers from the Residential Energy Consumption Survey (RECS).

CURRENT MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The previous HUSM allowed for the selection of 10 unit types and four alternatives. The table below shows how these unit types are related to the five RECS unit types and type numbers. Please use this table to determine the appropriate unit type to use in the current model. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3, so please choose Single Family Attached for the unit type in the current model.

PREVIOUS MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4